Clayoquot Sound/Central Region Tourism Opportunities Study: A Process Towards Tourism Development

Prepared for:

British Columbia Ministry of Small Business,
Tourism & Culture
Ma-mook Development Corporation
Aboriginal Business Canada
Nuu chah nulth Development Corporation

Prepared by:

ARA Consulting Group
(a division of KPMG Consulting LP)

and

Dr. Peter Williams
Simon Fraser University

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MAP INFORMATION

Original Report Maps	File Size
Recreation Inventory - Feature Significance Rating	4KB
Preliminary Tourism Development Interest Areas	4KB

Simplified / Generalized Maps

Existing Tourism Use	File Size
Study Area Base Map	1,160KB
Tourism Operator Facilities / Base of Operations	517KB
Tourism Features, Routes and Activity Sites	2,055KB
Tourism Use	585KB

Tourism Product Capability	
Backcountry Lodge	1,269KB
Freshwater Fishing	560KB
Hiking	6,057KB
Mountain Biking	1,022KB
Ocean Kayaking	594KB
Saltwater Fishing	580KB
Small Craft Marine Touring	595KB
Small Cruise Ship Touring	718KB

Summary – Clayoquot Sound Tourism

The Situation at a Glance

The Clayoquot Sound region of the West Coast of Vancouver Island holds some of Canada's greatest potential for significant tourism development. Its most significant attributes include:

- spectacular natural resources
- unique Aboriginal cultural experiences
- seven potentially complementary communities with unique characteristics
- accessible yet remote
- people from all communities interested in being full participants in the industry
- on the doorstep of very large numbers of tourists
- an almost perfect match of potential product with market preferences
- an opportunity to go forward in a manner which is sensitive to cultural values and the natural environment.

In spite of this incredible potential, there are major obstacles to the region realizing its full tourism potential in a manner equitable to all communities and residents. The distribution of tourism products and benefits in the region is, very inequitable. The focus has been primarily on Tofino and, to a lesser extent, Ucluelet. The five First Nation communities, with few exceptions, have not been partners in this new sector.

It might be argued the distribution is inequitable because the First Nation communities were not ready for tourism development. However, it is apparent, after much consultation in all seven region communities, that a major obstacle to equitable development of, and participation in, tourism lies in cultural differences, lack of understanding, mistrust, fear, and racial intolerance. Related to this, it is also noteworthy that tourism experiences are provided, by primarily non-Aboriginal operators throughout First Nations territories.

Land claims encompass most of the region, are and will continue to be an important factor to deal with in planning tourism . The consultation programme identified that First Nations residents, and residents of the other communities, wish to go forward in a more co-operative environment, with effective partnerships. Also, it was expressed there is a lack of knowledge on how to do this, and a lack of trust to begin the process.

In our opinion, this is one of the major obstacle to realizing the very significant tourism potential of the region. Yet, in the consultation program there was a clear request for guidance in achieving this. We recommend there be an approach developed specifically to achieve this; that someone who has the trust of all communities facilitate it; and that this be "top priority".

In combination with the above, there will need to be a concurrent series of training programs. These should cover a broad range of training needs. This will enhance readiness. At a concept

level, the training needs have been identified, and the applications for funding prepared and submitted.

At a community level, there is a need for awareness building and for the development of community based tourism planning. These needs have been expressed in most communities, with a special request for facilitation to address them.

Region Opportunities, Strengths, Weaknesses and Threats

The following are some of the primary opportunities, strengths and weaknesses which have been identified at a region level.

OPPORTUNITIES	• Keeping House – Nuu chah nulth heritage cultural centre – a major show piece for all Nuu chah nulth First Nations; preferably located at/near a central location such as the junction
	• scheduled/charter tour bus transportation service to meet needs of residents and to better meet needs of visitors to the region
	• central staffed facility with responsibility for:
	  • marketing the region
	  • marketing individual opportunities and products
	  • building web sites for individual operators and communities
	  • providing an email service
	  • providing a booking service
	  • developing and enforcing standards/quality control
	  • providing business support services
	  • providing and/or organizing tourism training at all levels
	  • developing and administering a tourism awareness program
	  • packaging and linking tourism products – building partnerships
	  • addressing issues (issues resolution)
	  • representing the tourism industry in the region – being the tourism voice/lobby for the entire region
	  • hiking trail management and co-ordination program – given the many unique trails
	• multi-cultural & inter-community task force/conflict resolution facility – to proactively promote communication and partnership between cultures and communities
	• land use/land access planning and administrative facility – to establish (pro-actively) protocol for land use and access, and conflict resolution

STRENGTHS	• the unique character of the region, especially:

	• the land meeting the waters, the rugged coastline, the many islands, the rain forest, the mountains, the valleys, the lakes, the streams • the ocean; vast, pounding surf, storms, smell, mist • other waters • biosphere which protects the region and encompasses all of the items identified here • Pacific Rim National Park • people; multi-cultural (Aboriginal), interested, multi-skilled, welcoming • communities; geographically spread, each with unique opportunities, different settings, welcoming • wildlife; varied, abundant, whales, seals, fish, shell fish, Bald Eagles, large variety of birds, deer, cougar, bears, marten, many other mammals, visible, habitat • access; getting there is an adventure, limited access keeping it special, close to major markets • the region character, products and potential products meet market preferences for: • adventure • nature • Aboriginal culture • Learning • Ecotourism • quality resource • the industry is relatively new in the region giving it an advantage of having an opportunity for careful effective development, avoiding the mistakes of the past, learning from the good and bad experiences of others
WEAKNESSES & THREATS	• the fact that the tourism products and operations have been primarily owned and operated by non-Aboriginals mostly in the gateway communities of Ucluelet and Tofino • fear, by non-Aboriginals, of Aboriginal entry into tourism, of land claims and access issues, of forming partnerships with Aboriginal peoples and communities • discrimination against Aboriginal peoples • while multi- (Aboriginal) cultures should be considered an incredible asset for all in the region, if not approached properly and sensitively, this will be a threat

	• lack of communication and trust between all seven communities in the region • lack of communication and trust between various factions in the communities • lack of knowledge (and facilitation) to achieve needed communication and trust • if the people of the region cannot (or will not) come together the opportunities will "go by" – the potential will not be realized the way it can be, all communities will not realize their full potential • some of the weaknesses/threats can be perceived as opportunities, depending on one's perspective. Some of the weaknesses/threats, if viewed in a positive light, can be seen as opportunities; however, from a negative perspective, they are seen as threats • forestry (i.e. clear cuts, logging trucks) – while it is well recognized this is a major contributor to the economy of the region, it has received strong negative attention and is visibly negative from the perspective of the tourist who wishes to enjoy a relatively pristine wilderness – the opportunity, which has to date received only very limited attention is an interpretation and presentation of forestry activities – tourists enjoy learning, including industrial aspects • training needs – while this can be perceived as a weakness, it is also an opportunity and strength. To meet the opportunities will require all sorts of skills training; this training can be tailored to meet the very specific needs of tourism development. The training, in itself, creates all sorts of opportunities, both in delivery, and in lifestyle and opportunities enhancement it engenders in people • there is a need for more awareness in communities of the opportunities associated with tourism, community and individual roles in tourism, what tourism can do for individuals, communities, and the region • governance & regulations – this relates to Parks (National & Provincial) the restrictions they impose, their lack of communication, their lack of recognition of communities, culture and history, their administration, their enforcement

Background

In 1999, the Ma-Mook Development Corporation commissioned the preparation of a tourism development framework for the area of the Central Region (Clayoquot Sound and Broken Islands) encompassed by the interests of the First Nations communities of:

- Ahousaht
- Hesquiaht

- Tla-o-qui-aht
- Toquaht
- Ucluelet

As the strategy framework began to unfold, it became critical to incorporate the broader perspectives and opportunities of tourism interest groups in Tofino and Ucluelet. In response, the BC Ministry of Small Business, Tourism and Culture (MSBTC) in partnership with the Ministry of Forests (MoF) and Forest Renewal BC (FRBC), provided the resources needed to further identify a full range of tourism development opportunities. This process is for all the region's seven communities, located in the area of Clayoquot Sound and the Broken Islands group of Barkley Sound.

The report does not mark the end of a process. Rather, it is an important step in the on-going development of a "living tourism strategy" for the Central Region. It represents a foundation upon which a series of steps can be taken to encourage the systematic and sustainable development of tourism in the region.

In keeping with the consultative and "living" character of the project, significant effort was made to engage as many stakeholders in the development of the information base and strategic directions reported.

The Region

The region under consideration in this report includes Clayoquot Sound and the Broken Islands Group. It is often referred to as the Central Region of the West Coast of Vancouver Island. It extends from Hesquiaht Harbour in the north to the Broken Islands in the south (see ***Location of Clayoquot Sound Study Area map***, Section 1.3).

The region contains five First Nation communities and the two gateway communities of Ucluelet and Tofino. It is characterized by a rugged coastline interspersed with expansive sandy beaches. The region is mountainous and heavily treed, with a mix of rain forest vegetation. It abounds with terrestrial and marine wildlife. It is recognized as being one of the most spectacular and biologically diverse natural settings in North America. In addition, the region is blessed with a deep rich culture of First Nation and non-Aboriginal culture and heritage.

Markets

Vancouver Island attracts approximately 32% of all visitors to British Columbia. British Columbia residents and non-residents, both, are an important source market for tourism to Vancouver Island. A recent destination study prepared by Tourism British Columbia reported that nearly 10 million visitors traveled to Vancouver Island for a day or overnight trip in 1995/96. Of these visitors, 5.4 million were BC residents and 4.5 million were residents of other countries (Tourism BC, 1998).

It is estimated, in 1995/96, there were approximately 3.7 million BC residents and 3.1 million non-residents who took an overnight trip in British Columbia, and visited Vancouver Island while on their trip.

Matching Product Potential with Market Preferences

The Clayoquot Sound region has superb natural beauty, and the natural settings that represent outstanding potential for ecotourism development. Some of the nature-based learning experiences which the region can provide include:

- trial walking, hiking and trekking
- back packing and wilderness camping
- whale watching
- other wildlife viewing
- beach combing
- sampling the indigenous foods of the region
- nature interpretation
- mountain biki g
- learning to survive in the wilderness
- casual walks to view wildlife and plant life
- kayaking, boating and canoeing
- Aboriginal experiences (e.g., traditional cuisine, fireside chit chats)
- photographic experiences
- sports fishing
- walking extensive hiking trails
- wilderness camping
- diving
- surfing
- storm watching
- enjoying spectacular settings and vistas.

Preliminary Opportunities Assessment

Through the GIS capabilities mapping done for the region and the extensive consultation over the last year, several areas were identified as having excellent to good potential for development of tourism opportunities. These areas are identified in the following table and the Preliminary Tourism Development Interest Areas map (see Section 5.1).

Location	**Hesquiaht Harbour**
Opportunities	1. guiding for beach walking, wildlife viewing and cultural interpretation 2. campground development

Location	**Sea Caves/Longhouse Trail**
Opportunities	1. guiding 2. trail development and management 3. concession/food sales
Location	**Hot Springs Cove**
Opportunities	1. international class health spa 2. campground
Location	**Pretty Girl Lake**
Opportunities	1. guiding inland hikers
Location	**Dixon Cove**
Opportunities	1. lodge development
Location	**McKay Inlet**
Opportunities	1. wide range of commercial tourism (guiding hikers, campground, rentals, concessions)
Location	**Ahousaht Village Site**
Opportunities	1. Walk-the-Wild-Side trail head interpretive development 2. Guiding 3. Sales 4. Campground
Location	**Cow Bay Area**
Opportunities	1. whale watching 2. lodge
Location	**Walk-the-Wild-Side Trail System**
Opportunities	1. trail development and management 2. guiding
Location	**White Pine Cove**
Opportunities	1. rustic cabin development
Location	**Bartlett Island**
Opportunities	1. kayaking 2. cultural interpretation 3. campground
Location	**West Coast Vargas Island**
Opportunities	1. campground development 2. kayaking
Location	**Meares Island**
Opportunities	1. trail development and management

	2. guiding 3. cabin/lodge development 4. cultural interpretation 5. natural history interpretation
Location	**Quait Bay**
Opportunities	1. campground 2. rustic cabins
Location	**Bedwell Estuary**
Opportunities	1. trail head development 2. campground
Location	**Bedwell Sound – Strathcona Park Trial**
Opportunities	1. trail development and management 2. guiding 3. campground
Location	**Tofino Inlet**
Opportunities	1. guiding 2. kayaking 3. campground 4. lodge 5. nature and culture interpretation
Location	**Long Beach**
Opportunities	1. guiding 2. interpretation 3. Wikaninnish interpretive centre
Location	**Ucluelet Beaches**
Opportunities	1. major keeping house/museum 2. resort 3. junction interpretive centre
Location	**Ucluelet First Nation**
Opportunities	1. guiding cultural interpretation 2. varied commercial
Location	**Torquart Bay – Cataract Mountain Shoreline Area**
Opportunities	1. kayaking 2. cultural and natural history interpretation 3. rustic cabins 4. lodge

	5. gateway shore facilities development and management
Location	**Barkley Sound - Broken Islands**
Opportunities	1. kayaking/canoeing 2. campground 3. rustic cabin 4. guiding & interpretation

1. Introduction

1.1 Background

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- Ahousaht
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- Tla-o-qui-aht
- Toquaht
- Ucluelet

As the strategy framework began to unfold, it became critical to include the broader perspectives and opportunities of tourism interest groups in Tofino and Ucluelet. In response, the BC Ministry of Small Business, Tourism and Culture (MSBTC) in partnership with the Ministry of Forests (MoF) and Forest Renewal BC (FRBC), provided the resources needed to further identify a full range of tourism development opportunities. This process is for all the region's seven communities, located in the area of Clayoquot Sound and the Broken Islands group of Barkley Sound.

The First Nations in the region have not historically been very involved in tourism sector opportunities. The focus, instead, has been on resource-related activities of forestry and fishing. This document responds to specific needs for community economic development as expressed by the Central Region Board and First Nations communities. It also addresses the expressed needs of the Tofino-Long Beach Chamber of Commerce, the Tofino Business Association, and MSBTC for integration of First Nations involvement in forest recreation and tourism business, and the needs of MoF and forest licensees for information on the non-timber values in provincial forest areas. The project further supports the on-going efforts of the Vancouver Island Treaty Negotiator's Office of the Ministry of Aboriginal Affairs.

In this context, the report considers Clayoquot Sound in an integrated fashion. The specific focus is on identifying forest recreation and tourism development strategies and opportunities and for First Nations residents in their five communities and for the two communities of Tofino and Ucluelet. The document's purpose is to assist all stakeholders interested in tourism development in the region to undertake actions, which will:

- diversify local economies
- maintain access to recreational resources for local residents
- minimize conflicts between resource users.

The report does not mark the end of a process. Rather, it is an important step in the on-going development of a "living tourism strategy" for the Central Region. It represents a foundation upon which a series of steps can be taken to encourage the systematic and sustainable development of tourism in the region.

1.2 Funding Sources

The significance of this report for tourism and other stakeholders in the study region is reflected in the numerous participants who voluntarily provided informed perspectives, and in the organizations and agencies who co-operatively provided the funding for the development of this foundation for a "living strategy". These include:

- the Band Councils and many interested members of the First Nation communities in Clayoquot Sound
- numerous interested non-First Nation residents living and working in Clayoquot Sound
- Aboriginal Business Canada
- British Columbia Ministry of Small Business, Tourism & Culture
- British Columbia Ministry of Forests
- Forest Renewal BC
- Ma-mook Development Corporation
- Nuu chah nulth Development Corporation.

1.3 The Region

The region under consideration in this report includes Clayoquot Sound and the Broken Islands Group. It is often referred to as Central Region of the West Coast of Vancouver Island. It extends from Hesquiaht Harbour in the north to the Broken Islands in the south (see ***Location of Clayoquot Sound Study Area map***).

The region contains seven communities; five First Nation communities and the two communities of Ucluelet and Tofino. It is characterized by a rugged coastline, which is interspersed with expansive sandy beaches. The region is mountainous and heavily treed, with a mix of rain forest vegetation. It abounds with terrestrial and marine wildlife. It is recognized as being one of the most spectacular and biologically diverse natural settings in North America. In addition, the region is blessed with a deep rich culture of First Nation and non-Aboriginal culture and heritage.

Traditionally, the primary economic activities of the region have been forestry and fisheries. The recent, coincidental, downturn in both industries has resulted in extensive economic/employment hardships throughout the region. The result has been a very high level of unemployment (over 70% in some communities), under-employment, failed businesses, a need for people to leave to find work outside the region, and the consequent associated social and personal difficulties.

Given the outstanding natural, historical and cultural resources of the region, tourism as a major growth industry is natural for the region. The current and potential experiences, which the region offers, are an ideal match with today's global market preferences.

1.4 Objectives

As originally defined by Ma-mook Development Corporation, over a year ago, the overriding goal of this study was to launch the process of preparing a tourism development strategy for the Central Region. More specific objectives that emerged as the project unfolded and as the number of partners increased included:

- integrating all five First Nation communities in the Clayoquot Sound region as well as Tofino and Ucluelet into the tourism planning process
- identifying specific geographic land/water areas with measurable potential for forest recreation and tourism business development opportunities, and the products best suited to develop in these areas
- identifying and analyzing the strengths, weaknesses, opportunities, and threats for forest recreation and tourism development for each of the communities in the study area
- identifying opportunities for the development of tourism partnerships between the seven communities, individual business operators and other stakeholders in the region
- providing community profiles which focus on the most viable opportunities for development, and recommending mitigation strategies of any impediments to appropriate development
- beginning a process of consultation and awareness building in the communities and their members.

1.5 Approach

Several different methods were used to gain the data needed to guide the report's development. Early on in the process, discussions with the project's steering committee clearly showed that this document would form the foundation for a "living strategy" as opposed to a relatively inflexible and definitive document. This report would be used to launch an ongoing process of strategy development and implementation, with consultation as a critical element. This approach was later confirmed by the MSBTC, MoF and FRBC partners who recognized that the outcome of the project would not be an end in itself, but a means to an end.

Initial baseline research for the project involved reviewing existing reports and databases concerning economic development, tourism performance and markets in the region. This work specifically focussed on:

- a review of tourism performance in the Region and Vancouver Island
- a review of economic performance and demographics for the seven communities in the region
- an examination of existing market data bases concerning ecotourism and Aboriginal tourism
- a review of existing tourism and recreation resource, activity and capability maps of the region developed by MSBTC in partnership with MoF and FRBC.

In keeping with the consultative and "living" character of the project, significant effort was made to engage as many stakeholders as possible in the development of the information base and strategic directions reported here. In this regard, the study team:

- held two workshops/meetings with a Central Region project steering committee
- conducted initial "tourism community meetings/workshops" in all of the First Nation communities to become familiar with key tourism development issues and opportunities
- undertook several field visits with First Nation and non-Aboriginal tourism operators to all communities and many parts of the region to gain first hand knowledge of the range of tourism products and experiences existing and potentially available during various seasons of the year
- conducted face to face and or telephone meetings with representatives of "key" organizations and agencies in the Region (e.g., Pacific Rim National Park, Biosphere Project)
- toured a specialist inbound tour broker through the region and had her assess the international market potential and readiness for various tourism products in the region
- held a second round of detailed SWOT (Strengths, Weaknesses, Opportunities and Threats) workshops with industry representatives, leaders and stakeholders in each of the seven communities to refine and confirm strategic opportunities and challenges identified in previous phases of the tourism capability identification
- met with key stakeholders to identify human resource development requirements for effective delivery of Aboriginal tourism products in the region, and for preparation of a training assistance program.

1.6 Situation Assessment

The tourism potential for the Clayoquot region is outstanding. Already favored with an international image as one of Canada's premier natural areas, the region offers significant future opportunities for high value tourism packages combining nature, culture and heritage experiences.

While most of the ingredients for well positioned and comprehensive tourism experiences exist within the region, very little in the way of tourism packaging has occurred to date. For the most part, tourism activity is offered by non-Aboriginal individual operators and/or a combination of operators, sometimes working together. By far, the majority of tourism activity is rubber tire, and traditional attractions are the natural beauty of the coast, Pacific Rim National Park Reserve, whale watching, coastal kayaking and sport fishing. More specialized and interesting experiences have been developed in the last decade, including winter storm watching and surfing.

The locus of tourism activity in the region is Tofino. This community has adopted tourism and has been especially active in encouraging tourism growth in the region. It serves as the most developed receiving and staging area for tourism pursuits throughout the region.

Clayoquot Sound's most easterly hub for tourism is Ucluelet. With a downturn in the area's forestry and fishing economies, Ucluelet has only recently begun to recognize tourism as a source of economic activity. As a consequence, it is strengthening its image, role and infrastructure as a staging centre in the more easterly portions of Clayoquot Sound and western sections of Barkley Sound.

First Nations have not been very significantly involved in the tourism sector as active participants or as partners, relative to non-Aboriginal involvement. There are several examples of Aboriginal tourism ventures (see Section 4, ***The Existing Product***), but, generally speaking, First Nations have not yet participated in tourism as in a substantial way. There can be substantial discussion and

debate as to why First nations have not been very involved in tourism, but the important fact is they want to now and are seeking ways to be.

With the curtailment of significant forestry activity, the assumption of resource management responsibilities by First Nations in several sectors, and the recent designation of the Clayoquot Region as a Biosphere, there are real opportunities for First Nations to become involved in the tourism sector. The challenge will be to ensure a healthy and meaningful tourism sector that meets the aspirations of communities while not jeopardizing traditional culture.

In this context, it will be important to establish a tourism development approach which is community driven and which has tourism awareness, capacity building, and setting tourism objectives as a clear part of the development approach.

1.7 The Report

As mentioned above, this report serves to provide a strategic direction for the ongoing development of tourism in the region. While considerable emphasis is placed on identifying opportunities for tourism development that are of particular interest to First Nations communities, more work must be done to create individual tourism action plans for each of the seven communities and the region as a whole. It will require extensive regional and community consultation to create these plans. This document provides some of the much needed First Nation and non-Aboriginal input needed to get these planning processes going. More specifically, the report provides:

1. a brief economic and demographic profile of the seven communities in the region
2. an description of tourism opportunities in the region, based on extensive consultations with local informants, field research, and tourism resource, activity and capability mapping information done by MSBTC in partnership with MoF and FRBC
3. an analysis of the strengths, weaknesses, opportunities and threats associated with these tourism opportunities in each of the communities
4. a description of a preliminary and conceptual tourism development strategy for the region
5. an outline of the next steps and procedures needed to create a vibrant and sustainable tourism industry for both First Nations and non-Aboriginal residents in the future.

2. The Central Region And Its Communities

2.1 Introduction To The Region

The study region encompasses all of Clayoquot Sound and the Broken Islands Group, further south towards Barkley Sound (see ***Location of Clayoquot Sound Study Area*** map).

The region is characterized by a rugged Pacific coastline, interspersed with many beautiful beaches, such as Long Beach in Pacific Rim National Park Reserve. In terms of its natural resources, the region has been blessed with an abundance, including:

1. marine:
    - a rugged Pacific coastline with spectacular wild waters and surf
    - meandering shoreline along tidal inlets, lakes, freshwater rivers and streams
    - ocean vistas, often broken only by distant ships
    - in places, a maze of islands each with its own uniqueness
    - dramatic land-ocean interfaces.
2. terrestrial:
    - snow-capped mountains dipping into the ocean
    - beautiful expansive beaches
    - old growth rain forest vegetation providing a thick canopy of diverse trees and vegetation, including giant cedars and mahogany trees
    - inland lakes, rivers, streams and valleys.
3. wildlife:
    - almost unbelievable, marine life diversity including several species of whales, which can be viewed nine to ten months of the year
    - seals, fish, shellfish, and all sorts of species, making it one of the premier cold water diving areas of the world
    - land mammals including bears, cougars, wolves, coyotes, deer and many others, many of which can be viewed readily
    - a large variety of bird life, including one of the world's largest concentrations of the majestic Bald Eagle.

This unique mix of natural features, combined with the cultural and heritage traits of the local communities and their peoples, present a region which provides many of the product attributes that a growing proportion of tourists are seeking in their leisure travels.

2.2 The Communities

There are seven communities in the region; five are First Nation communities which include, from north to south, Hesquiaht, Ahousaht, Tla-o-qui-aht, Ucluelet and Toquaht, and two non-Aboriginal communities of Ucluelet and Tofino.

All communities have a range of infrastructure and support services. The extent of this varies, somewhat, depending on the size of the community and its remoteness. Each of the communities has a range of human resource capabilities. There is a greater concentration of more specialized skilled labour in the two gateway communities, which are the service centres for the region. With the downturn in the two primary industries of fishing and forestry, there is considerable unemployment and under-employment. While this varies by community, it is especially pronounced in some of the Aboriginal communities which have unemployment rates in excess of 70%. Clearly, there is a desperate need for alternative economic development. Some re-training will be required, but this represents an opportunity and the labour pool is there, and ready.

The region is linked to tourist markets by water, air and land. However, the primary access mode is by automobile via Highway #4. While very scenic, this access route is relatively winding and narrow. As a consequence, it takes a relatively long time to access more developed and populated regions of Vancouver Island. For instance, it takes over an hour and a half to travel by automobile from either Ucluelet or Tofino to the largest population centre beyond Clayoquot Sound, Port Alberni. Furthermore, the region is at least two and a half hours from ferry access to the large populations of the Lower Mainland. Air service to the region is limited in capacity, frequency and seasonal availability. Within the region, all of the communities are linked to one another by a combination of automobile, water taxi and, in some cases, airplane transportation modes. Each of the communities within this transportation network are briefly described in the following paragraphs. (A more detailed profile for each of the communities is in Appendix A).

Ahousaht First Nation

The Ahousaht First Nation occupies twenty-five reserves, representing a bit more than 590 hectares of land. The main community is Marktosis Reserve No. 15 on Flores Island, which lies off the West Coast of central Vancouver Island. The community is accessible only by floatplane or by boat.

As of November 1998, there were 1,562 members of the Ahousaht First Nation. Of these members, 568 lived on Ahousaht First Nation reserves and 994 lived off reserve.

The main Ahousaht community of Marktosis sits on a hill overlooking a bay. The community has a beautifully designed school with a gymnasium and accommodates all grade school levels. It also has police service, a nursing station, a general store, a restaurant and a bed and breakfast.

Hesquiaht First Nation

Hesquiaht First Nation occupies eight reserves on approximately 330 hectares of land. The main community is Refuge Cove Reserve No. 6, also known as Hot Springs Cove. This community is the most remote of the communities in the Central Region. There is no road access, and transportation to the reserve is provided by float plane or water taxi service from Tofino.

As of November 1998, there were 561 members of the Hesquiaht First Nation. Of these members, approximately 150 lived on Hesquiaht First Nation reserves and the remainder lived off reserve.

Hot Springs Cove is on the opposite side of Refuge Cove from the British Columbia Provincial Parks Trail Head to the Hot Springs. It is a very picturesque community, sprinkled along a steep escarpment going down to the water.

The community has a lovely lodge, with self-contained service. All rooms come with deck and overlook (sit over) the harbor and a view of the cove's wildlife and a beautiful setting. Food services are also available in the community.

Tla-o-qui-aht First Nation

The Tla-o-qui-aht First Nation currently occupies ten reserves on approximately 230 hectares of land. The First Nation resides in two separate communities, on two separate reserves. One of them, which serves as the centre of government for the First Nation, is at Opitsat located on Meares Island, across the bay from Tofino. Opitsat is a picturesque little village that stretches along the ocean with a relatively high mountain as a background. Community cows serve to give the community an appearance of continuous fresh green grass. Opitsat is only accessible by water, but only five minutes by boat from Tofino. The other Tla-o-qui-aht First Nation community is at Owista, located between Pacific Rim National Park and Tofino. This small community, also located on a bay, houses a fairly large number of band members. It has a small general store and craft sales centre, and is developing a gas bar. It is located on the main highway that goes along Pacific Rim National Park, between Ucluelet and Tofino.

As of November 1998, there were approximately 730 band members of the Tla-o-qui-aht First Nation. Of these members, approximately 270 lived on Tla-o-qui-aht First Nation reserves and 450 lived off reserve.

The Tla-o-qui-aht First Nation owns and operates one of the major resorts along the west coast, near Tofino. This resort, named the Tin Wis offers 85 rooms, all with a spectacular ocean view and is situated along a sand beach. Excellent food services and meeting facilities are available at the Tin Wis Resort. The Tin Wis has offered the Tla-o-qui-aht First Nation an opportunity to provide considerable training and employment for its band members.

Toquaht First Nation

The Toquaht First Nation occupies seven reserves on approximately 200 hectares of land. Their main community is on the Macoah Reserve, on the North Shore of Barkley Sound. The community of Macoah is accessible by road and water. The band administration office is located in Ucluelet.

As of November 1998, there were just over 100 band members with the Toquaht First Nation. Of these, only a very small number (less than 15) lived on Toquaht First Nation reserves.

The Toquaht First Nation is a very small First Nation, and its commercial ventures are mainly related to forestry and fisheries. One of their members operates a First Nation art gallery, the DuQuah, in the same building that houses the band offices. Many of the band members live and work in Ucluelet, or in other communities on Vancouver Island.

Ucluelet First Nation

The Ucluelet First Nation occupies ten reserves on approximately 200 hectares of land. The main Ucluelet First Nation community is Ittastsoo Reserve No. 1, which is located just across the bay from the town of Ucluelet. The community of Ittastsoo is the community that houses a large portion of the Ucluelet First Nation peoples.

As of November 1998, there were approximately 600 members of the Ucluelet First Nation. Of these, approximately 230 lived on the Ucluelet First Nation reserves, and the remainder lived off reserve. The community of Ittastsoo is situated along a stretch of the Inlet in a picturesque setting. The community provides many of the amenities which service the population, including a band office and community hall functions. Its close proximity to Ucluelet, by road, enables band members to obtain their provisions and whatever services they require with relative ease.

The Ucluelet First Nation has reserve lands in other locations. One of these reserves is located along the rugged west coast just south of Pacific Rim National Park Wickanninish Centre. This reserve contains approximately 70 acres, is heavily forested, and is situated relatively close to the junction. This reserve is a very lovely piece of land, with good potential for significant tourism development.

Town of Tofino

"On the edge" of Vancouver Island, the District Municipality of Tofino sits on a peninsula facing the islands of Clayoquot Sound. Tofino is 125 km west of Port Alberni by highway. The municipality was incorporated in 1932, comprising a total area of 1941 hectares.

Tofino is a small town with a significant growth rate. The population was estimated to be 1480 people in 1999, based on 1996 census data. For Tofino, 1999 marked the fourth consecutive year of population growth greater than 5% (BC STATS).

In 1996, the labour force consisted of 815 people in Tofino. The employment/population ratio of 78.6 was considerably higher than the provincial average (60.0) (Statistics Canada).

Employment has been increasing in Tofino, resulting in one of the lowest unemployment rates of any BC community. The peak tourism season for Tofino is March to August, though winter storm watching and more economical shoulder season travel are increasingly common. The tourism industry (comprised of accommodation, food and beverage) employed the most people (23.3%) in Tofino in 1996, followed by retail trade (12.9%) and construction (10.4%). Primary industries such as fishing and trapping (6.1%) and logging and forestry (3.1%) have contributed much less to the area's economic base in that same period (Statistics Canada).

Town of Ucluelet

Ucluelet has an intriguing history of human settlement. The Nuu cha nulth people were the first to recognize Ucluelet Inlet as "yu-clutl-ahts" a "good landing place for canoes". A gateway to the Long Beach and Broken Group Islands of Pacific Rim National Park Reserve, Ucluelet may be accessed by highway, 99 km west of Port Alberni, 42 km south-east of Tofino or by ferry from Port Alberni. The village of Ucluelet was incorporated in 1952 with a total area of 1144 ha. The population of Ucluelet was estimated to be 1760 people in 1999.

The industry employing the most people in Ucluelet in 1996 was manufacturing (18.4%), followed by accommodation, food and beverage (15.3%) and logging and forestry (11.2%). Government service and retail trade also comprised about 10% each of the community's labour force (Statistics Canada).

The labour force in Ucluelet (1996) was 980 people, for an employment/population ratio of 68.8 (Statistics Canada). The unemployment rate for Ucluelet was 12.2% in 1996. The level of unemployment rate was largely attributable to substantial downturns in the region's fishing and trapping industries during this period (BC STATS).

3. The Markets

3.1 Introduction

Vancouver Island attracts approximately 32% of all visitors to British Columbia. British Columbia residents and non-residents, both, are an important source market for tourism to Vancouver Island. A recent destination study prepared by Tourism British Columbia reported that nearly 10 million visitors traveled to Vancouver Island for a day or overnight trip in 1995/96. Of these visitors, 5.4 million were BC residents and 4.5 million were residents of other countries (Tourism BC, 1998).

The Tourism BC study did not provide a breakdown of the proportion of day visitors to overnight visitors for either the resident or the non-resident visitor markets to Vancouver Island. However, it is estimated that 68% (20.9 million) of the total 30.6 million day and overnight visitors to British Columbia in 1995/96 were overnight visitors. A similar breakdown between day and overnight visitors can be assumed for both BC resident and non-resident visitor markets to Vancouver Island. Based on this assumption, in 1995/96 there were approximately 3.7 million BC residents and 3.1 million non-residents who took an overnight trip in British Columbia, and visited Vancouver Island while on their trip (for more detailed information on visitors to Vancouver Island see Appendix B).

3.2 Visitor Characteristics

Based on the BC Visitor data, the following visitor characteristics are most likely associated with the markets that visit the west coast of Vancouver Island:

- most visitors are British Columbia residents, followed by other Canadians, American, and then Europeans
- visitors are from all age groups, but the majority are between 25 and 65 years of age
- the largest proportion of visitors have high levels of formal education
- most visitors have incomes in the middle and upper income brackets
- the average visitor travel party is about two persons, and comprised of couples or family members
- a large proportion of visitors rely on word of mouth, and their own past experience as sources of travel information
- a large proportion of visitors participate in a variety of recreation, nature and culture related activities. Among the most frequently pursued outdoor activities are hiking and watching birds / wildlife
- many visitors express a strong interest in Aboriginal arts and crafts as well as cultural activities.

3.3 Ecotourism

Ecotourism is addressed as a separate section in this chapter, because the type and quality of the tourism resources in the central region are an ideal match with what the ecotourists are seeking. In simple terms, ecotourism can be described as tourism that involves nature based experiences particularly, but also adventure and/or cultural experiences, that are delivered with an educational focus and in an environmentally sensitive manner. In practice, other components are involved in ecotourism, such as benefiting local communities, experiencing the resources on their own terms, and protecting the resource base (such as through a code of ethics).

Examples of ecotourism destinations which have gained international reputations and contributed to their countries are Costa Rica and Africa. However, there are many other destinations in the world which are now emerging as ecotourism "hot spots" (e.g., Latin America, Southeast Asia). Recent research has demonstrated that Canada, and Western Canada in particular, is incredibly well suited to ecotourism development. As mentioned, the west coast of Vancouver Island has a very high quality resource capable of competing globally for the world ecotourism market.

The Clayoquot Sound region has superb natural beauty, and the natural settings that represent outstanding potential for ecotourism development. Some of the nature-based learning experiences which the region can provide include:

- trail walking, hiking and trekking
- back packing and wilderness camping
- whale watching
- other wildlife viewing
- beach combing
- sampling the indigenous foods of the region
- nature interpretation
- mountain biking
- learning to survive in the wilderness
- casual walks to view wildlife and plant life
- kayaking, boating and canoeing
- Aboriginal experiences (e.g., traditional cuisine, fireside chats)
- photographic experiences
- sport fishing
- walking extensive hiking trails
- wilderness camping
- diving
- surfing
- storm watching

- enjoying spectacular settings and vistas.

3.4 The Ecotourism Markets

Recent research provides a picture of who the ecotourism markets are, and provides good profile information. Some of these findings are summarized in Exhibit 3.1. The summary of the several research sources is that those markets with potential include:

- both male and female in relatively equal proportions
- all ages, but ages 25 to 54 in larger proportions
- households with couples, and some families
- higher than average incomes
- well educated individuals.

Exhibit 3.1 Profiles of Ecotourist and Adventure Travelers

Market Characteristics	Typical Adventure Traveler to Canada[1]	Typical American Adult Adventure Traveller[2]	General Consumer Interested in Ecotourism[3]	Experienced Ecotourist[3]
Household Income	no information	76%>US$30,000 (CDN$40,000) 18%>US$75,000 (CDN$100,000)	live in neighborhoods with >US$35,000 (CDN$45,000)	no information
Age	52.7% 20 – 44 years	51% 25 – 40 25% 45 – 64 10% 65+ Average is 40	all ages 25 – 54 mostly	25 – 54 mostly
Gender	54.4% male, but varies by activity	51% male (vs 60% travelers overall), but varies by activity	males & females, but varies by activity	males & females, but varies by activity
Household	no information	66% married (vs 56% travelers overall) 50% have children (vs 37% travelers overall)	44% couples 1/3 families	47% couples ¼ families
Education	no information	41% completed college 35% professional / managerial 12% retired	well-educated	high education 82% college graduates

1. Tourism Canada 1995; 2. TIAA 1994; 3. HLA/ARA Consulting 1994

3.5 Characteristics Of Travel

The following present some of the ecotourists travel characteristics:

- Ecotourists tend to stay longer on their nature-based vacation than general tourists do. The HLA/ARA ecotourism study in 1994 found that the preferred length of stay was between 4 and 7 days. However, it should be noted that a full 50% of the people interviewed in this study preferred stays of over 8 days, and 21% preferred stays of 2 weeks.
- The majority of ecotourists prefer to travel summer months. However, there appears to be enough interest in winter travel to justify four seasons products (HLA/ARA 1994).

- The party composition for travelers is primarily couples (62%), families with children (15%), and other (23%) (HLA/ARA 1994).
- A variety of sources have found the desire for more rustic, intimate, adventure-type roof accommodation (such as B & B's, cabins, lodges, inns) is a growing market trend (Hawkins et.al. 1995, Selengut 1995, HLA Consultants 1996, Wight 1997). Recent ecotourism research has found that markets interested in ecotourism are interested in more than the conventional hotel/motel options, or camping.
- Ecotourism activity preferences revolve around:
  - activities that involve couples, followed by family opportunities
  - active outdoor experiences, with hiking-walking as most popular and growing
  - nature interpretation and learning about nature
  - land-based activities
  - water-based activities, such as rafting, boating, kayaking, canoeing
  - visiting parks and protected areas
  - camping
  - fishing
  - visiting cultural attractions and learning about cultures.
- Some of the primary motivations for taking an ecotourism trip include:
  - escaping to un-crowded, remote and wilderness areas
  - learning about wildlife, nature and Aboriginal cultures
  - providing assistance and other benefits to local communities
  - viewing plants and wildlife
  - experiencing physical challenge.
- An area which is of high importance to ecotourism markets, is visiting a park or protected areas. This has a very high ranking interest, and was identified in the HLA/ARA 1994 study as a reason for taking an ecotourism vacation. In the case of the Clayoquot Sound area this correlates very highly with Pacific Rim National Park and the newly designated biosphere reserve.

4. The Existing Product

4.1 Development of Tourism Product in Clayoquot Sound

The Clayoquot Sound region abounds in cultural and natural resources which currently serve the visiting tourists, and have the potential of better meeting tourist preferences. (See ***Recreation Inventory: Feature Significance Rating*** and see links to ***Tourism Product Capability: Clayuquot Sound*** maps in Map Information at the head of this document). However, the tourism potential, exemplified by the natural and human resources, has not been well developed in ways which:

- capitalize on a broader range of the region's existing natural and cultural assets
- create a more equitable distribution of tourism's potential economic and social benefits to all of the region's communities
- provide a more systematic and integrated approach to managing the development and use of tourism resources within the region
- encourage resident and community participation in the planning and management of the region's tourism industry
- support the implementation of the principles of sustainability (environmental, cultural and economic).

When compared to the more traditional primary resource industries in the region, tourism is a relatively recent contributor to the area's economic base. As such, it still has a long way to go in its development. It will be important that future tourism product development in the area occurs in ways which can contribute to the principles identified here.

4.2 Tourism Products in the Region

The focus of the tourism product in the region is the two communities of Tofino and Ucluelet. The five First Nation communities have very limited tourism products. It is important to note that some of these communities are very small and either do not wish to have tourism products directly within their residential communities or, if they do want tourism product, prefer that it be well planned and sensitive to the culture of the communities. The communities all wish to be partners and operate tourism businesses on their reserve lands and their territories. The most visible of the First Nation tourism products include:

- the Tin Wis Resort near Tofino
- the "Inn" at Hot Springs Cove
- the Aboriginal Art Gallery, the DuQuah, in Ucluelet
- the Aboriginal Gallery in Tofino
- a variety of First Nation bands and individual water taxi operations
- one or two bed and breakfast operations

- a limited number of adventure / whale watching / boat operations
- an airplane excursion business
- miscellaneous, but limited, service establishments, serving both local residents and tourists.

A partial inventory of tourism operations in the Clayoquot Sound region, recently completed by MSBTC, shows a preponderance of accommodation operations in the region (***Tourism Features*** map and ***Facilities: Clayoquot Sound*** map). The inventory identifies forty-nine different accommodation ventures. These range from larger five-scale resorts along the ocean-front having spectacular views of the ocean enabling storm watching, to smaller quaint and unique bed and breakfast operations. The vast majority of these accommodation facilities are located either in or near Tofino and Ucluelet. Although accommodation facilities overwhelm the tourism operations, there is a relative shortage of good quality fixed-roof accommodation in the peak summer season. Except for a few accommodation facilities which have been successful at marketing winter tourism, the vast majority experience very low occupancy rates during the off season. This exemplifies a need to more effectively market shoulder season and winter season tourism.

The second largest frequency of tourism operations found in the MSBTC inventory are companies that provide tours, charters and/or adventure products such as ocean kayaking. The inventory identifies 22 such operations. Other ventures in the inventory are miscellaneous service businesses, including interpretative centres and galleries. While we know there are many restaurants which serve visitors to the region, they were not part of the inventory.

5. Identification Of Tourism Opportunities

This section identifies a range of new tourism development opportunities in the region. These opportunities have been identified using the methods outlined in Section 1.4 of this report. A very extensive consultation process was followed to arrive at an identification of these opportunities.

There are several types of tourism opportunities identified in the region. Given the early stages of tourism development, the opportunities are many and of all types. For purposes of this report, the following types are addressed:

1. Geographic specific – these are opportunities that:
   - fit within the high capability areas identified by the above referenced GIS modeling and mapping
   - were identified during the consultation process as areas where there is interest for potential specific products.
2. Major regional attractions – these are opportunities that:
   - will serve to represent the entire region and are central to the areas coordinated development
   - act as major draws for tourists.
3. Infrastructure enabling – these are opportunities that:
   - will provide necessary infrastructure to enable tourism development
   - will serve functions related to the needs throughout the region.

While most of these opportunities should be developed as private sector initiatives, several of them are of a character requiring regional support from public and private sector organizations, at least in the initial implementation stages. Others may require specific First Nations support at the Band Council/community level to initiate. Additionally, others may require the initiation, support and management by a regional organization of First Nation and other regional governments. Each of the opportunity groupings is discussed in the following sections.

5.1 Geographic Specific Opportunities

The GIS mapping and the consultation program has identified 22 specific geographic areas in the region which have potential for tourism development (***Preliminary Tourism Development Interest Area*** map). These sites have been selected as those representing the most significant near term potential recreation and tourism development in the Clayoquot Sound area. This does not negate the potential or importance of other possible sites for recreation/tourism development, but represents the best, currently available, information and expert analyses. The following sites are presented in a sequence which generally goes from Northwest to Southeast in the region. The names associated with each of the sites have been assigned to reflect the key values of each area. A brief description of each of the sites is presented below.

Exhibit 5.1 Recreation and Tourism Opportunities – Potential Tourism Development Sites

(1) Hesquiaht Harbour

This site includes the whole of Hesquiaht Harbour from the entrance as one arrives from the south going by the Longhouse, Cougar Annie's building site and around the bay past the residences and reserve land on to the lighthouse point.

(2) Sea Caves/Longhouse Trail

This covers a trail area, currently partially developed, which would extend from the Hot Springs Cove village across to the sea caves to the north-west following the shoreline and the rainforest into Hesquiaht Harbour and all around the Harbour to the lighthouse point.

(3) Hot Springs Cove

This location includes the shoreline in and around Hot Springs Cove, as well as the village of the Hesquiaht First Nation, the camp area and store at the trail head to the hot springs, the boardwalk trail to the hot springs and the hot springs.

(4) Pretty Girl Lake

Located near Sydney Inlet between Hesquiaht and Ahousaht, this site provides an opportunity to wander along the shoreline of a fresh water lake. It has been identified by the BC government as a special management area for recreation.

(5) Dixon Cove

Located just north of Flores Island, on the north side of Shelter Inlet, this site has potential for a lodge development. It is adjacent to a new protected/park area, and has strong wildlife viewing potential.

(6) McKay Island

This site is on a small island situated close to Ahousaht. It offers potential for a wide range of commercial tourism opportunities including provisioning, concessions, food services and camping.

(7) Ahousaht Village Site

This site includes the community and the area immediately surrounding the community. It provides excellent potential for gateway and staging functions for tourism activity in Ahousaht territory.

(8) Cow Bay Area

This site is on the south side of Flores Island, and includes the "Walk-the-Wild-Side-Trail". It has potential for an ecolodge development associated with the trail.

(9) Walk the Wild Side Trail System

It includes the whole perimeter of Flores Island. Significant potential exists for the development of additional forms of accommodation along the trail system.

(10)White Pine Cove

This site includes the lands immediately north of Cat Face Mountain in Herbert Inlet. It has potential for the development of rustic cabins.

(11)Bartlett Island

This site is located between Flores and Vargas Islands. It includes areas that may be of special interest to kayakers. It could include possible camping areas.

(12)West Coast Vargas Island

Located on the west side of Vargas Island, this is an area frequented by kayakers who come from Tofino. It currently is used for informal camping, but has commercial opportunities associated with camping.

(13)Meares Island

The whole of Meares Island represents excellent potential for a wide variety of tourism development opportunities.

(14)Quait Bay

Located near Cyber Bay, this site may have opportunities for the commercial development of rustic lodges or camping areas.

(15)Bedwell Estuary

Located at the head of Bedwell Sound, this area has opportunities for limited facility developments such as campgrounds.

(16)Bedwell Sound – Strathcona Park Trail

In this area, there currently is a trail, which provides limited access to Strathcona Park. Opportunities exist to develop and manage this trail system more fully.

(17)Tofino Inlet

This area provides relatively easy access to Clayoquot Sound for most tourists. Tofino provides excellent gateway and staging functions to the Sound. It could develop stronger linkages with Aboriginal communities to the North.

(18)Long Beach

Currently developed as a national park, this area is used extensively to support a range of tourism opportunities. It also has significant potential to develop co-operative linkages with First Nation groups in the interpretation of cultural and heritage dimensions of the entire Clayoquot region.

(19)Ucluelet Beach Area

This opportunity area includes all of the foreshore lands from the south end of the Pacific Rim National Park Reserve to the boundary of the town of Ucluelet. The area's spectacular coastline offers considerable potential for scenic and wildlife viewing, accompanied by easily accessible resort development.

(20)Ucluelet First Nation

This community site includes the area located across the across the bay from the town of Ucluelet. The community's shoreline and community centre offers opportunities for the development of water tours, festivals and ceremonies, retailing and other First Nation initiatives that can capitalize on the proximity of travel markets going to Ucluelet.

(21)Toquaht Bay – Catarac Mountain Shoreline Area

This area includes the foreshore area essentially from Ucluelet all the way to Toquaht Bay. It offers potential for hiking trails, camping developments, provisioning, lodge development and rustic cabins.

(22)Toquaht Bay – Barclay Sound – Broken Islands

This area encompasses the Broken Islands and shoreline area associated with Toquaht Bay. It offers opportunities as a staging area for travelers going into the Broken Islands.

Each of the above described sites was further assessed to identify:

- specific opportunities at each of the sites
- likely season of operation
- likely target markets
- development priority (this priority was assigned on the basis of the consultation program and our assessment of the initiative's contribution to the overall tourism development of the Clayoquot Sound region).

Exhibit 5.2 Preliminary Opportunities Assessment

Location	**Hesquiaht Harbour**
Opportunities	1. guiding for beach walking, wildlife viewing and cultural interpretation 2. campground development
Season of operation*	S, SU, F, W
Target markets	Local, national, international, schools
Development priority	Low
Location	**Sea Caves/Longhouse Trail**
Opportunities	1. guiding 2. trail development and management 3. concession/food sales
Season of operation*	S, SU, F, W
Target markets	local, national, international
Development priority	medium to high
Location	**Hot Springs Cove**
Opportunities	1. international class health spa 2. campground
Season of operation*	S, SU, F, W
Target markets	national, international
Development priority	medium
Location	**Pretty Girl Lake**
Opportunities	1. guiding inland hikers
Season Of Operation*	S, SU, F
Target Markets	local, national
Development Priority	low
Location	**Dixon Cove**
Opportunities	1. lodge development
Season Of Operation*	S, SU, F, W
Target Markets	local, national
Development Priority	low
Location	**McKay Inlet**
Opportunities	1. wide range of commercial tourism (guiding hikers, campground, rentals, concessions)

Season Of Operation*	S, SU, F
Target Markets	local, national
Development Priority	low

Location	**Ahousaht Village Site**
Opportunities	1. Walk-the-Wild-Side trail head interpretive development 2. Guiding 3. sales 4. campground
Season Of Operation*	S, SU, F, W
Target Markets	schools, local, national, international
Development Priority	medium
Location	**Cow Bay Area**
Opportunities	1. whale watching 2. lodge
Season Of Operation*	S, SU, F, W
Target Markets	national, international
Development Priority	medium
Location	**Walk-the-Wild-Side Trail System**
Opportunities	1. trail development and management 2. guiding
Season Of Operation*	S, SU, F, W
Target Markets	schools, local, national, international
Development Priority	high
Location	**White Pine Cove**
Opportunities	1. rustic cabin development
Season Of Operation*	S, SU, F
Target Markets	local, national
Development Priority	low
Location	**Bartlett Island**
Opportunities	1. kayaking 2. cultural interpretation 3. campground
Season Of Operation*	S, SU, F
Target Markets	local, national
Development Priority	low to medium
Location	**West Coast Vargas Island**
Opportunities	1. campground development 2. kayaking
Season Of Operation*	S, SU, F

Target Markets	local, national
Development Priority	low to medium

Location	**Quait Bay**
Opportunities	1. campground 2. rustic cabins
Season Of Operation*	S, SU, F
Target Markets	local, national
Development Priority	Low
Location	**Bedwell Estuary**
Opportunities	1. trail head development 2. campground
Season Of Operation*	S, SU, F
Target Markets	schools, local, national, international
Development Priority	Medium
Location	**Bedwell Sound – Strathcona Park Trial**
Opportunities	1. trail development and management 2. guiding 3. campground
Season Of Operation*	S, SU, F
Target Markets	schools, local, national, international
Development Priority	medium
Location	**Tofino Inlet**
Opportunities	1. guiding 2. kayaking 3. campground 4. lodge 5. nature & culture interpretation
Season Of Operation*	S, SU, F, W
Target Markets	schools, local, national, international
Development Priority	high
Location	**Long Beach**
Opportunities	1. guiding 2. interpretation 3. Wikaninnish interpretive centre
Season Of Operation*	S, SU, F, W
Target Markets	schools, local, national, international
Development Priority	high

Location	**Ucluelet Beaches**
Opportunities	1. major keeping house/museum 2. resort 3. junction interpretive centre
Season Of Operation*	S, SU, F, W
Target Markets	schools, local, national, international
Development Priority	high
Location	**Ucluelet First Nation**
Opportunities	1. guiding cultural interpretation 2. varied commercial
Season Of Operation*	S, SU, F, W
Target Markets	local, national, international
Development Priority	medium
Location	**Torquart Bay – Cataract Mountain Shoreline Area**
Opportunities	1. kayaking 2. cultural & natural history interpretation 3. rustic cabin 4. lodge 5. gateway shore facilities development and management
Season Of Operation*	S, SU, F
Target Markets	local, national, international
Development Priority	high
Location	**Barkley Sound - Broken Islands**
opportunities	1. kayaking/canoeing 2. campground 3. rustic cabin 4. guiding & interpretation
Season Of Operation*	S, SU, F
Target Markets	local, national, international
Development Priority	high

* S = Spring SU = Summer F = Fall W = Winter

5.2 Major Regional Attraction Opportunities

There are four major regional attractions/opportunities which have been identified as being required for the region's integrated development and presentation as a tourist region. These are briefly described in the following table.

Exhibit 5.3 Regional Opportunities

Area	Potential Project	Description
Regional	Cultural museums	• requested in most communities • to provide cultural interpretation • should be integral to keeping house • can be linked and in several locations
Regional	Keeping house	• consider international design competition • located close to junction, but on coast • should be the central focus for all interpretation in the region • should be the "show piece", the hub of all region tourism experiences • will be unique, cultural, sensitive and authentic
Regional	Meeting/Convention facilities	• could be located as stand-alone on Kvarno Island or in association with resorts and/or keeping house
Regional	Junction interpretation centre	• positioned as an info centre, gateway to the region • could be positioned as a "biosphere" passport office • limited interpretation/emphasis on information • should link to other interpretation throughout region

5.3 Requirements/Opportunities Related To Infrastructure And/Or Regional Support

To facilitate the foregoing tourism development initiatives, the consultation process identified several recurring challenges that would have to be addressed. These infrastructure developments are considered critical to the future growth of tourism in the region. They are described in the following paragraphs:

- ***Marine access facilities*** – This is especially critical in Tofino where operators from outlying First Nations communities do not have adequate access to appropriate docking facilities for their community and business purposes.
- ***Highway commercial transportation service*** – Public modes of transportation into the region are very limited. They range from very infrequent scheduled airline service to the regular "Greyhound" scheduled ground service. There is a chronic lack of a more flexible "tour" bus service to better meet the tourism requirements of the region, and to provide a very badly needed service within the region and between the communities.
- ***Vehicle parking in Tofino*** – This was consistently identified as a major problem, both in Tofino and in the communities that access the major road networks through Tofino. This problem applies to residents of outlying communities who need parking space for their vehicles when they leave by water taxi and to tourists who are seeking a place to park their vehicles within Tofino. It is also a problem for residents and business owners in the community of Tofino.
- ***Marketing/reservation system*** – Marketing of the region is limited to the efforts of individual operators. Many of the existing and potentially new operators, are engaged in small businesses and do not have the resources or experience needed to develop good marketing systems or communication networks. Some form of centralized / coordinated marketing for operators in the region would serve the entire region quite well. Similarly, this applies to a related reservation system.
- ***Facilitation for partnership formation and packaging*** – Because the region's tourism industry is still relatively young, there has been limited opportunity for good partnerships to be formed to create comprehensive packages capable of attracting markets and making the tourism offerings in the region more attractive.
- ***Training*** – Given the transition of the economy in the region from forestry and fisheries to tourism, there is a chronic need for training at all levels to effectively and efficiently move the human resource capabilities of the labour force forward in a competitive fashion.
- ***Linking to the biosphere project*** – The area's UNESCO biosphere designation will be officially declared this spring. This biosphere project represents a very significant potential for the development and promotion of tourism in the region. Considerable assistance is required to, sensitively, realize the potential associated with incorporating First Nation culture, heritage and values into the biosphere project.
- ***Access/control/management of lands, operators and visitors*** – There are many issues surrounding this particular topic including:
  - unrestricted and unmanaged access to lands throughout the region by almost anyone

- operators from outside the region coming into the area without any licensing or regulatory requirements
- growing influxes of visitors all over the region with no management guidelines or code of ethics for visitor behaviors
- encroachment of operators and visitors on traditional lands and private lands with no permission or sensitivity.

- ***Financial services to facilitate development*** – While this challenge is not necessarily unique to this region, it may be more chronic here because of the depressed condition of the economy, high unemployment rates (especially in the first nation communities) and the relatively new state of the tourism industry. This speaks to a need for providing financial assistance in the form of funds and/or counseling to enable existing ventures to move forward and new ventures to start.
- ***Communication/internet network*** – Similar to the above and because it is a relatively new industry with many small and new entrants, there is a requirement for assistance with the new wave of communication associated with the "internet."

6. Tourism Opportunities, Strengths and Weaknesses

The following analysis is based on several overriding perspectives:

1. the significant presence of First Nations populations and their claims for traditional territories in this region
2. the reality of their limited engagement in past tourism initiatives
3. the growing market interest in cultural tourism.

All provide a distinct opportunity to more competitively position the region for further tourism development.

Indeed, the full engagement of First Nations in future tourism development represents a tremendous opportunity for all peoples of the region. The need to incorporate all seven communities into future initiatives is a fact which cannot be ignored. The leadership in First Nation communities must be prepared to incorporate appropriate forms of tourism into their planning and programming agendas in ways which are productive for their communities and the region. Tourism development in the region will only proceed in a sustainable fashion if there is meaningful recognition that First Nations participation is a tremendous opportunity for all.

This section summarizes many of the strengths, weaknesses, and opportunities which the Clayoquot Sound region and its communities should address in order to systematically move tourism development forward in a sustainable fashion over the next decade. Based on consultations with key stakeholders in each of the region's communities, pertinent market information and exemplary cases from other jurisdictions, the analyses are presented on a by community, initially, and then more overriding and regional perspectives are provided. Many of the opportunities identified by the stakeholders in the consultation processes reinforce the presence of many under-utilized and high tourism capability resources identified in the geographic areas presented in the preceding chapter.

The following tables of opportunities, strengths and weaknesses, by community, are presented in the order in which the Jan-Feb 2000 community workshops were held. (Note: the presentation for each community varies, since the areas of interest and focus of discussions varied.)

It is also important to note that many of these opportunities fit within one or more of the 22 high tourism capability geographic areas mapped and presented in the above chapter.

6.1 Ucluelet First Nation

OPPORTUNITIES	• converting fishing boats to tourist boats • providing camper facilities and amenities • developing linkages to newly designated Clayoquot Biosphere program

	(UNESCO) • creating tour product partnerships with individuals from other communities • developing a centralized communication centre to facilitate inter-community partnerships related to tourism products and services, marketing assistance, labour pools, etc. • developing First Nations food services for tours
STRENGTHS	• tourism policy adopted via Band Council Resolution already in place • well documented culture/history of community in place • availability of multiple reserves sites with significant resource potential • existing well situated marina site and facilities • existing tribal canoe demonstration program • close proximity to tourism markets and support services in Village of Ucluelet • easy water access to tourism markets by water transportation
WEAKNESSES & THREATS	• limited land transportation access (especially bus) to Village of Ucluelet • limited awareness and skill training concerning tourism business opportunities • having things "thrown at them" from outside which they do not want • lack of a community tourism strategy/plan • limited commitment from residents who have many questions concerning the role and value of tourism to their community • lack of an identified leader to take tourism forward in a coordinated and planned fashion • limited communication concerning "who's doing what" in tourism • Parks Canada wardens "unreasonably" enforcing regulations in traditional land areas

6.2 Tla-o-qui-aht First Nation

OPPORTUNITIES	• creating expanded hiking trails and camping facilities on Meares Island • creating a canopy trail development on Meares Island • creating a hut-to-hut trail near Sutton's pass • developing a walking trail from Tofino south-east to Long Beach • developing a hiking trial into mountain and lake areas adjacent to Opitsaht • administration of the BC Packers site as a centralized tourist reception

	and staging centre for tours etc. • developing a "head lease" system for managing tourism access and land use in traditional territories of Clayoquot Sound • developing carvers display and story tellers programs for use in tour packages and programs. (e.g., at the BC Packers location) • developing water based touring and taxi services
STRENGTHS	• proximity of each community to main tourism markets in Tofino and Pacific Rim National Park Reserve • well recognized Aboriginal traditions and heritage – culturally modified trees, legends, oral history • availability of traditional foods • Tin Wis Resort as a well established accommodation centre and location for hospitality and tourism training • well established cultural interpretation capability -"we can tell OUR story better than others" • strong marketing skills and assistance capability – web site design, email service, logo design, joint marketing, business planning • experience with existing tourism operations
WEAKNESSES & THREATS	• over-doing tourism developments so they impact on traditional values • squatters and current tourism operators using traditional lands • lack of standards, qualifications and safety in many current operations • lack of well developed marketing programs • lack of financing for tourism infrastructure and facility development • lack of prime locations in Tofino from which to create product awareness for First Nation tourism opportunities in traditional territories • conflict between operators over access to markets and tourism areas

	communication, hospitality, Aboriginal language training • lack of control on tourist access to Opitsaht • tourism operator use of First Nation peoples • limited knowledge and information sharing between communities - people are often afraid to share • no protocol between communities with respect to use of traditional lands • no community tourism strategy

6.3 Toquaht First Nation

OPPORTUNITIES	• creating a heritage/interpretative and languages resource centre • developing a First Nations art school • creating a staging area for kayaking tours to Broken Islands and Toquaht Bay • developing and managing campground near Toquaht Bay, but not at Macoah • operating a water rescue centre • preparing and serving traditional foods • developing and co-managing a hiking trail from Toquaht Bay to Ucluelet following the old telegraph line • developing a high end resort at Stuart Bay near Ucluelet • training First Nation "conservation" officers to help monitor, assist and enforce resource and visitor management policies in the area
STRENGTHS	• community has strong cultural orientation and appreciation of cultural diversity, and interest in cultural revival • availability of existing arts/cultural centre in Ucluelet, with good exposure to regional travel markets

	• near proximity and direct access to Broken Islands, but not on beaten path • only band led by a hereditary chief • proximity to well developed kayaking market in Broken Islands • currently in process of documenting First Nation oral history and knowledge of historical areas suited to interpretation
WEAKNESSES & THREATS	• dispersed and small number of band members due to lack of local work opportunities • limited appreciation or orientation towards tourism • no community tourism action plan • restricted season for most tourism businesses • limited tourism marketing knowledge or programming • restrictive cultural barriers (e.g., discrimination between cultural groups) make entry into tourism enterprises challenging • difficult economic conditions make entry into tourism enterprises tough • lack of human resource training and skill development related to tourism • limited access to attractive tourism sites • limited access to financial resources needed for tourism development • limited community awareness of tourism development options • growing number of non-native initiatives developing (with little or no communication) immediately adjacent to the Macoah community • on-going inter –First Nation competition – many to do with land claims

6.4 Town of Ucluelet

OPPORTUNITIES	• development of more roofed accommodation, food services and camping facilities to address high season shortages • development and management of expanded trail network • collaboration with other First Nations communities in the development of products and services so as to gain unique cultural tourism positioning advantages • emphasizing community's role as a gateway and staging community for the southern portion of Clayoquot Sound and the Broken Islands

	region • providing more services to "high-end' tourists, while not neglecting existing tourism markets • focusing product development on creating various types of industrial or heritage tourism – e.g., how things work (canneries, fish cleaning, wood villages, harvesting) • developing a stronger service/reception role at Junction Centre in partnership with other First Nations groups • expanding the tourism season through activities such as special festivals and events which incorporate local heritage and traditional foods / cultural experiences • creating a centralized marketing and reservation system for the whole region • developing a bus/commuter service for the region
STRENGTHS	• an existing and recent community development plan which sets out strategies for retaining the area's natural beauty through orderly growth • Ucluelet's historical position as an non-tourism centre, which now offers unique and authentic industrial resources for interpretation • Clayoquot Sound's Biosphere Reserve Designation will likely attract a new wave of "scientists" to the community • adjacent First Nations communities are interested in partnerships for the development of new culturally focused tourism operations • a well developed and attractive lighthouse site • close proximity to the Pacific Wild Trail • gateway access to the Broken Islands • proximity to Pacific Rim National Park • available and skilled labour force along with supportive NGOs • existing water transportation (Francis Barkley) from Port Alberni to Ucluelet providing kayaking drop off services • near access to excellent diving sites
WEAKNESSES & THREATS	• limited capacity to handle large influxes of tourists during peak season • accommodation bottlenecks during the high season • limited support infrastructure for accommodation development (e.g., water) • excessive numbers of day trippers coming in from Port Alberni,

	limiting beneficial impacts to community • limited cooperation with other communities and tourism operators in the region • balancing visitor numbers with quality of life impacts • traffic capacity limitations (roads/services) to/within the region • limited access to capital for tourism initiatives • significant bureaucracy associated with developing and managing tourism operations (e.g., licensing) • limited training of personnel specifically for tourism operations • relatively short operating season

6.5 Town of Tofino

OPPORTUNITIES	• expanding B&B operations to accommodate tourists • expanding commercial roofed accommodation capacity • developing broader range of retail operations to strengthen gateway and staging centre roles • developing tourism products and services which emphasize activities based on education and learning (e.g., biology and archaeology) • developing tourism products and services in partnership with First Nation communities and incorporating First Nations experiences • focusing new product development on the provision of authentic experiences associated with the culture, heritage and nature of the region
STRENGTHS	• existing market presence and unique positioning • large numbers of tourists already coming to the region • year round tourist market appeal • Biosphere Reserve designation and the international profile that accompanies it, as well as the commitment to systematic protection of the area's natural and cultural • existing recognition of tourism as the community's primary economic sector • proximity to the natural and cultural resources of Clayoquot Sound • proximity to the region's marine and terrestrial beauty (e.g., Pacific Rim National Park Reserve, etc.)
WEAKNESSES & THREATS	• no current community development and associated tourism action plan

	• limited service infrastructure support (water, sewer, transportation) • major parking shortage • limited tourism carrying capacity planning • shortage of accommodation and other guest services in the high season • no resolution of First Nations land claims • limited hiking trial management • limited recognition by provincial government of importance of tourism • lack of housing for service staff • feelings of racial tension - fears and mistrust • poor access to and from outlying First Nation communities (e.g., transportation costs and scheduling) • limited First Nation access to docks for tourist markets • need of human capacity building/training related to tourism and hospitality • limited communication and co-ordination between communities on tourism issues • inconsistency in tourism operational standards and land use regulations enforcement between government departments • lack of standards and quality control in tourism product development and delivery

6.6 Ahousaht First Nation

OPPORTUNITIES	• obtaining a greater share of region's tourism revenues associated with the use of traditional territories • developing an outlet/store for sale of products produced by local artisans and associated artisans village • developing a museum/cultural centre (repatriation) • developing a coordinated sea bus service • developing whale watching and sport fishing operations • establishing a long house and associated properties • developing a resort hotel (like Tin Wis) perhaps in conjunction with the Walk-the Wild-Side trail • developing a facility in Tofino to act as a gateway to Ahousaht

	tourism experiences • developing Aboriginal stories and programs for inclusion in authentic eco-cultural tourism experiences • developing campsites and kayak rentals • creating log cabins for wilderness hikers at designated areas, within traditional territories • conducting traditional food festivals • providing provisioning services for kayakers and others • developing a "herbal" trail
STRENGTHS	• Ahousaht claims rights to about 50% of Clayoquot land and resources • strong sense of community identity –"our people and our ideas" • located in a well protected marine location and marina • well developed Walk-the-Wild-Side Trail • strong knowledge of traditional foods (fish and berries) • some well trained and experienced guides in the community • close proximity to caves, rivers, wildlife, beautiful natural resources • many well educated/trained people in the community • well organized community that can come together to meet a challenge
WEAKNESSES & THREATS	• limited awareness of how to combine land and resources for tourism purposes • lack of information exchange and partnership amongst community members • limited understanding of the benefits of tourism • strong ties to past economy reduce interest in tourism development (e.g., fishing, forestry) • no community tourism action plan • mistrust between communities • limited awareness of how to deal with tourists, know what they want and how we can offer it • limited sources of funding • limited identification of people who can lead tourism initiative • limited assistance for business planning

	• difficulty in obtaining insurance for tourism operations • limited access to parking for tourists and operators in Tofino • limited awareness of how to market tourism products and services

6.7 Hesquiaht First Nation

OPPORTUNITIES	• developing hiking to sea caves and Hesquiaht Harbour attractions • developing a gateway and staging centre for tourism operations on Tofino waterfront • providing a range of whale watching, kayaking, sport fishing and hiking tours and experiences run by local guides • developing skills and interpretive capabilities of local guides • creating a wilderness lodge • developing traditional food products and services (e.g., smoked fish, eel eggs) • establishing an artists centre, complete with demonstration projects – canoe making, basket weaving, food preparation, carving, dancing, story telling, songs, drumming
STRENGTHS	• residents in the community have expressed interest in tourism development • local water taxi services currently exist • many beautiful and accessible reserve sites appropriate for development exist (e.g., spectacular tourism attractions in the region include scenic locations close to Hot Springs Cove, wildlife in Hesquiaht Harbour, heritage resources at Estavan point and the lighthouse, a long house, pristine and remote river and lakes, as well as a rich cultural history evident throughout the area) • an existing pool of enthusiastic but currently unemployed local residents with many good ideas
WEAKNESSES & THREATS	• limited financial resources to do things like build trails • no community tourism action plan • internal conflicts over use of reserve lands by band members • limited training and business skill development related to tourism • limited marketing ability - don't know how or where to take new product ideas • limited confidence in dealing with "what we don't know and understand" • on going challenges in working with Tofino (e.g., parking access,

	developing partnerships, resource sharing and mistrust, acceptance and discrimination, non–Aboriginal fear of competing with natives) • limited interpretive training • limited awareness of tourism business commitments (not a five day a week business)

6.8 Region Opportuh ties,S trengths and Weaknesses

Several of findings from this analysis have implications not only for individual communities but also for the region as a whole. The following are some of the primary strengths, weaknesses, opportunities and threats that have been identified at a region level. In many cases, they have implications for ongoing infrastructure development and capacity building and are discussed in more detail in the tourism development strategy section of this report.

OPPORTUNITIES	• developing a Keeping House – Nuu chah nulth heritage cultural centre – a major show piece for all Nuu chah nulth First Nations – preferably located at/near a central location such as the junction • creating a scheduled/charter tour bus transportation service to meet needs of residents and to better meet needs of visitors to the region • creating a, or instilling in a, centralized and coordinating tourism organization with responsibility for: – marketing the region – assisting in the marketing of individual opportunities and products – assisting in the creation of web sites for individual operators and communities – providing a well developed internet marketing service – providing a booking service – developing and enforcing standards/quality control – providing business support services – providing and/or organizing tourism training at all levels – developing and administering a tourism awareness program – packaging and linking tourism products – building partnerships – addressing issues (issues resolution) – representing the tourism industry in the region – being the tourism voice/lobby for the entire region – creating a coordinated trail management system • incorporating forestry based tourism experiences into the region's product portfolio. Opportunities exist to develop interpretative and demonstration programs which highlight innovative and

	environmentally friendly industrial practices being implemented in the region • establishing a multi-cultural and inter-community task force/conflict resolution program facility – to proactively promote communication and partnerships between cultures and communities • creating a land use /land access planning and management program, to establish and pro-actively administer a protocol for tourism land use and access to First Nations traditional lands in Clayoquot Sound
STRENGTHS	• the unique mix of natural and cultural features in the region including: – the rugged coastline, the many islands, the rain forest, the mountains, the valleys, the lakes, the streams – the ocean's dynamic character: pounding surf, storms, smell, mist – other pristine inland rivers, lakes and streams – the Biosphere Reserve which protects the region and its natural and cultural attributes – the resources and facilities of Pacific Rim National Park – the multi-cultural mix of peoples (including First Nations) interested in tourism, skilled, welcoming – the many unique communities located in geographically different settings, each with special opportunities and welcoming people – the diverse, abundant and visible wildlife and associated habitats: whales, seals, fish, shell fish, birds, deer, cougar, bears, marten, many other mammals, visible – the relatively close proximity to markets via adventurous modes of access which make getting there a special experience • the region's existing potential for tourism products and services which meet market preferences for: – adventure – nature – Aboriginal culture – learning – ecotourism – high quality environments and resource • the relative newness of tourism in the region, which provides the opportunity to carefully develop future tourism products, services

	and facilities in ways which avoid the mistakes of the developments elsewhere, learning from the good and bad experiences of others
WEAKNESSES & THREATS	• limited development of tourism products and services owned and operated by peoples or organizations in First Nations communities • limited development of tourism products and services developed and managed in partnerships between First Nation and non-Aboriginal peoples throughout Clayoquot Sound • uncertainty concerning implications of First Nations entry into tourism, land claims and access issues, partnerships with First Nation peoples and communities, investment amongst non-Aboriginals • while First Nations and other cultures should be considered an incredible asset for all people in the region, if not approached properly and sensitively, the opportunity to emphasize and position this uniqueness in the marketplace will be lost • limited incorporation of forestry based tourism experiences into the region's product portfolio. While opportunities exist to develop interpretative and demonstration programs which highlight innovative and environmentally friendly industrial practices being implemented in the region, they have not been developed • lack of communication and trust between and within all communities in the region • perceptions of discrimination amongst First Nations peoples in access to opportunities for employment, participation, facility access and investment in tourism development • lack of knowledge concerning means of facilitating dialogue and addressing communication and discrimination issues. If people of the region cannot (or will not) come together and address these issues, tremendous opportunities will "go by" and the region's communities will not realize their full potential • poor environmental image of past forestry practices as expressed in the form of numerous logging trucks, clear cuts, soil erosion, stream degradation sites throughout the region - reduces attractiveness of region for tourists, many of whom wish to enjoy relatively pristine wilderness environments • limited skill development tailored to meet the very specific needs the tourism industry. Without this training, numerous opportunities in employment and lifestyle enhancement will reduce the capacity of communities to deliver tourism products and services • limited community awareness of the opportunities, individual and community roles, and potential positive and negative effects of

	tourism for individuals, communities, and the region • limited co-operation and dialogue concerning governance and regulations associated with National and Provincial park lands with respect to restrictions imposed, recognition of communities, culture and traditions, enforcement processes

7. Towards A Tourism Strategy

7.1 Introduction

The Ma-Mook Development Corporation has been proceeding in the direction of a planning a tourism strategy for First Nations in the region. It is doing so based on three main objectives:

1. To provide a regional framework for tourism development within which tourism aspirations of individual First Nations communities can flourish (i.e., a supporting tourism development environment).
2. To make the tourism strategy ***regional***, embracing all seven (Aboriginal and non-Aboriginal) communities in the region.
3. To identify what support tools, structures and organizations are necessary to support individual communities in their efforts to develop tourism.

The Ma-mook Development Corporation is guided by the perspective that individual First Nations communities must determine their own aspirations for tourism activity. To that end, Ma-mook's role is one of facilitator. In order for First Nations and other communities to decide on their tourism objectives, there must be a "capacity building" process in each community. This is planned to start as part of the tourism development strategy for the region.

At the same time, tourism development is influenced by the institutional and legislative context. Ma-mook has a particular role to play in identifying and addressing the constraints to realizing a vibrant tourism future for the region.

This chapter summarizes some of the constraints identified in the above chapters and assesses them in the context of identification of appropriate support mechanisms for community-based tourism. Additionally, it begins to define a strategy for tourism development within this context.

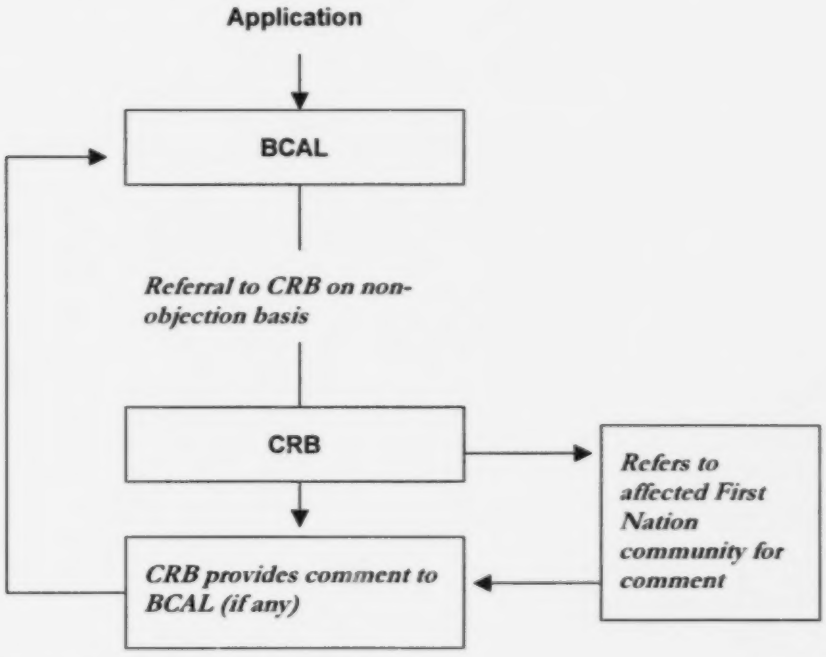
7.2 The Institutional Context

In most areas of the province, authority for managing Crown Lands is the responsibility of the British Columbia Assets and Lands Corporation (BCAL). The Clayoquot region is different, with a special agreement between the province and First Nations governing land use management authorities.

The mechanism for resource management and planning in the region is the Central Region Board (CRB), mandated through the Interim Measures Agreement between the province and First Nations. The CRB is a co-management mechanism jointly agreed between the province and First Nations. Now subject to negotiation on the provisions for extending the Interim Measures Agreement, it is expected that the CRB will continue to serve as a resource management authority in the region.

Throughout the province, tourism activity outside of incorporated municipalities falls under the provisions of the commercial backcountry recreation policies of the province. The exception is the Clayoquot region, where applications for commercial tourism activity fall under the authority of the CRB as a delegated responsibility from the Interim Management Agreement.

The application process for land use activity in the Clayoquot region (outside incorporated areas) follows the process outlined below. The CRB receives referrals of applications for land use from BCAL on a non-objection basis. CRB in turn refers the application for comment to the affected First Nation community. CRB elects to provide comments back to BCAL depending on input received.


Application
BCAL
Referral to CRB on non-objection basis
CRB
Refers to affected First Nation community for comment
CRB provides comment to BCAL (if any)

7.3 Constraints to Tourism Development

The history of tourism in the Clayoquot region has been both a success story and a concern. On the positive side, the area's natural, heritage and cultural features have proven to be a major international attraction and a world-wide reputation is developing. The recent Biosphere Reserve designation has only served to enhance that reputation.

The Clayoquot region, with its superb resource base and cultural diversity, represents one of the destinations in BC that stands out internationally. The area's potential is superb, but it has historically been somewhat constrained by the intense resource issues faced by the region over the past several years. Now that the broader environmental issues have been placed in a management framework that has attracted consensus from most groups, the potential for tourism from a First Nations perspective can be more effectively explored. The benefits can be substantial, offering both community tourism products and associated revenue generation together with the opportunities for many small businesses ranging from those offering direct services to visitors to small industries that may serve the tourism sector.

It is important to explore the specific constraints to tourism development that First Nations may face in attempting to pursue their aspirations in this sector.

Tourism activity in the region is currently dominated by the community of Tofino, generally regarded as the staging centre and a gateway point for exploring the region's marine and land resources. A majority of adventure operators are located in the Tofino area, together with a cluster of hotels and resorts. Ucluelet, following the decline of forestry, is more aggressively exploring its tourism future and also attracting tourism development as a staging and gateway centre.

While there has been growth in the tourism sector, there is a negative side. The area has attracted a plethora of small tourism operations offering everything from kayaking to hiking and sportfishing. The problem is that there is no tourism activity management system to regulate these activities and to manage the resource base in terms of its capacity to accommodate these activities. In addition, many of the operations do not pay license fees, nor do they have permits to operate to operate in some areas. The primary reason for this somewhat chaotic situation rests with the fact that there is no overall management co-ordinating and monitoring regime in place. While the Crown Lands backcountry recreation system requires permits to operate, there is little anyone can do to stop an individual who wishes to "get into business".

As tourism activity increases, the problems associated with this situation can only get worse. Already, there are concerns over whale watching practices (particularly the number of boats in a given location) and indiscriminate access to the region's natural and traditional community areas.

For First Nations and other regional communities to embark on a tourism development path, some fundamental issues need to be addressed. These are listed below and discussed in the remainder of this part of the chapter. .

- regulation of tourism activity and management of the application process for land and for shore commercial and recreation activity permits
- community capacity
- a overriding tourism strategy framework
- linkages to the Biosphere Reserve.

7.4 Management of Land Use and Marine Activities

There is little point in the region pursuing a tourism future without comprehensive resolution of the rather chaotic land use situation in the region. The lack of co-ordinated management and monitoring of the commercial tourism activity in the region is antithetical to a tourism initiative where one attempts to build capacity on sustainable tourism principles.

The Current First Nations Land Use Situation

In terms of land use, about two-thirds of the land mass is managed by First Nations through the Ma-mook Development Corporation and the Forest Tenure Agreement of the ISAAK Forestry Company. The Forest Tenure Agreement currently covers former TFL 44 (now TFL 57) for which the transfer was approved in 1998. Negotiations are now underway for ISAAK to manage TFL 54. In terms of the remaining Crown land, this falls under the authority of the province and is administered through the CRB.

Marine activity is an entirely different issue. Land use management, generally through the CRB and specifically as it relates to forestry through ISAAK is already in place. Commercial tourism and recreation activities in the marine area are, at present, largely unregulated. At the present time there is no mechanism other than the commercial backcountry lease situation to manage marine activities.

A Recommended Solution

This recommended solution is that of the consultants, alone. it came about through extensive consultation in the communities, and our experiences elsewhere.

The key, missing ingredient for managing the tourism future of the region relates to establishing regulations for foreshore activities. Without this, and without much more aggressive management and monitoring on the part of the province, there is little point in proceeding to pursue an effective tourism development future, which includes all communities. In this context, there are international precedents for managing sensitive areas in situations where tourism activity is increasing. For example, national parks and the creation of self-financing National Park authorities is one such technique. Essentially, this involves the transfer of Crown lands to an authority who is delegated responsibility for management including the retention of revenues generated from Crown lands.

Suitable for international situations, this is not the type of technique that has been used in Canada. However, there is available a "head lease" mechanism for commercial backcountry recreation activity in British Columbia. Available under the provisions of the Crown lands administration, the head lease concept involves the approval for an organization to manage all activities within a specific area, subject to the provisions of the head lease agreement.

This mechanism is indeed appropriate for the situation facing the Clayoquot region, outside incorporated municipalities, and it is recommended for implementation. While a bold step, it would enable First Nations, in partnership with the gateway communities, to realize a viable tourism future. It would enable, work with all region stakeholders to ensure sustainable and responsible tourism, and lend an air of certainty for the future of tourism. It is consistent with the spirit and intent of the Interim Measures Agreement and does not compromise in any way the activities of incorporated municipalities or citizens seeking to develop privately owned lands.

The Crown Lands Application Process

The current Crown Lands process involves an applicant satisfying the application requirements under the provisions of the commercial back country policy to BCAL. BCAL makes a referral to the CRB to identify any objections to the awarding of the application. In other words, CRB can elect to make an objection within a pre-specified time period or to make no objection. The time period is set in regulations at 60 days.

The CRB refers the applications to the First Nations community most affected. In most cases there is no response from the First Nations since there is no capacity to effectively review the application and make comments known to the CRB. Therefore, most applications do not receive any objections.

Decision Support Needs

In order to ensure an effective head lease management regime, there are several decision support needs that have not yet been made. These relate to the tools found in land use and resource management plans that decision makers use in assessing applications. Specific examples are:

- guidelines for tourism activities including visitor management plans for sensitive areas
- designation of sensitive areas
- codes and standards of operation for commercial tourism activities ranging from public health and safety concerns to resource management and protection methodologies
- guidelines for fixed roof developments in especially sensitive areas (e.g., resort guidelines)
- guidelines generally for fixed roof facilities in non-incorporated areas of the region (e.g., to promote a sensitive design theme).

In addition to these, it is noted that work is currently underway on TEK processes for four of the regions watersheds (with 10 more required). This is proceeding under a forestry initiative with First Nations. It will be very important to complete this TEK process for the entire region, given the influence that it can have on commercial tourism and recreation activity to be permitted in the region. It will also lend considerable certainty to the entire investment community looking to proceed with tourism investments, giving them a frame of reference for assessing whether to proceed on particular initiatives.

In reviewing the decision support requirements for an effective head lease management program, the following ingredients are missing:

- there is no land use plan or land use framework plan other than forest development plans
- there is not sufficient community capacity to take on tourism development, let alone head lease management
- there are many science issues that need to be reflected in land use and resource management regimes (e.g., in the form of visitor management plans).

Technical Capacity Support

To be able to manage a Head Lease program, specific skills and expertise are required in several areas including licence/permit management, application/approval processes, and monitoring and appeal processes. In order for First Nations to accommodate and effectively take on head lease management, there should be technology transfer programs from BCAL. This will require some form of replication of the backcountry commercial recreation process (to ensure consistency with the remainder of the province), but with special provisions reflecting the unique character of the Clayoquot region and the First Nations needs.

7.5 Community Capacity

Capacity Building Needs

In order to successfully embrace tourism activity as an economic development initiative, there are several capacity building issues that must be addressed in each community. These include:

- organizational and institutional issues and the absence of a decision making structure to decide on and pursue tourism ventures
- the fact that communities have not undertaken a comprehensive review of tourism potential, nor assessments of the degree to which they wish to pursue tourism (i.e., a vision for tourism, objective and strategy)
- the absence of human resources development programs related to tourism and support for micro-enterprise programs. This is a key point.

While there are many opportunities, including joint ventures with existing tourism operations based out of Tofino or Ucluelet, there is a clear need for capacity building to develop tourism and to take on joint venture potential where it is consistent with community aspirations.

Guiding Principles for Community Capacity Building

The following guiding principles are recommended, by the consultants:

(i) each First Nation and non-Aboriginal community undertakes capacity building assessment through their own process with support from regional organizations

(ii) Ma-mook Development Corporation co-ordinates the launching of the community capacity building program including the development of tools to support First Nations community efforts

(iii) On-going support for these processes is provided through a new Central Region administration mechanism.

Support tools for the effort should include:

- micro-enterprise training
- human resources development training
- various management templates for such areas as business incorporation for tourism, joint venture agreements, community tourism action planning processes, resource management assessment methodologies, etc.
- communications infrastructure including web-based communication and the recently purchased radio station
- linkage programs to educational institutions and other capacity building organisations; partnerships
- product demonstration activities (e.g., Clayoquot Spirit)
- a system of "facilitators" to help with brokering joint ventures, preparing business plans, and addressing areas of conflict
- a program for micro-enterprise lending.

These tools should be available to strengthen and enhance the efforts of each community in pursuing their own community capacity building.

Regional Central Region Administration Mechanism

A Central Region administration should be developed with the following roles and mandate.

Role:

To provide administrative support, advice and recommendations to the Central Region communities

To monitor, report and make recommendations concerning the various initiatives of the collective Central Region First Nations (CRFN), Tofino, Ucluelet, CRB, WCTA and MDC.

Initial Mandate:

- To provide advice and direction to the Central Region in their collective approach to co-ordinating development in the Central Region and in developing partnerships and associations amongst governments and agencies
- to develop the facilities and infrastructure needed to effectively implement its role and the mandate of the Central Region collective
- to facilitate, coordinate and monitor the development and implementation of the extension to the Interim Measures Agreement and associated trust fund
- to facilitate, coordinate and monitor the development and activities of regional initiatives such as the Central Region Board, UNESCO Biosphere, etc.
- to facilitate and coordinate effective communication both within the collective and with external entities and developments
- to facilitate the creation of awareness and promote understanding of the culture, heritage and traditions of the CRFN
- to facilitate and coordinate the enhancement of capacity and organization for development within each of the CRFN and the gateway communities of Ucluelet and Tofino
- to facilitate and/or provide services to the CRFN and other communities
- to form a management group to facilitate and coordinate creation of strategic development plans for each First Nation
- to facilitate coordinated infrastructure development strategies to implement plans and identify areas where economies of scale can be achieved through utilization of modern communications technologies.

Intra-community protocols

The principle that is espoused in developing community capacity building programs and pursuing tourism is that each First Nation community as well as Tofino and Ucluelet is distinct. In addition, community capacity building should not only include tourism perspectives, but also address broader community human resource management issues. . This should become an operating principal under which each community would become responsible for managing tourism-related resources. Their management activities would include:

- creating "territory monitors" – working in conjunction with the region's land use and resource management organizations to ensure responsible tourism activity and management processes are implemented
- facilitating the management of intra-community resources through resource management protocols (e.g., the BC Packers site, trails spanning more than one community)
- establishing protocols for the use of resources for each tourism activity.

7.6 Communications and Linkages

Linkages with the Biosphere Reserve Program

The Biosphere Reserve Program offers an opportunity to support the implementation of this proposed regional tourism development strategy and its associated community capacity building initiative. In particular, the program invites applications from communities to support the development of community resource management guidelines where research and education is required. An example is the visitor management program for the whale watching activities of the tourism industry in sensitive bays and inlets in the region. Joint ventures between researchers and communities to establish the guidelines for community resource management will be an important ingredient of the region's tourism future.

The biosphere offers a superb opportunity to strengthen the branding and certification themes for tourism that are now under development in the region. This covers not only products and services, but also the marketing campaign that will ultimately be developed for the region's tourism products.

The development of standards and codes to govern tourism activity is enhanced through the biosphere designation. Branding/certification can be deployed as incentives to strengthen adherence to these standards and codes.

Finally, the Clayoquot Biosphere Trust Society is an excellent vehicle for forming international and national partnerships to further the objectives of the Clayoquot Biosphere Reserve and a sustainable relationship between the land and its peoples.

Communications and Marketing

There is a need to implement an external communications program. In order to attract partnerships (government, educational and corporate) to further the objectives of all communities, it is suggested that a communications strategy be developed. The centrepiece of this communication strategy should involve the development of an Internet communication system and website. The content for such a website would cover the informational needs of all communities in the region including policies and program activities related to land use and resource management (e.g., the TEK process, etc.). It would also be structured to effectively link the websites of each community.

7.7 Principles for a Tourism Strategy

In order to guide the establishment of an appropriate strategy, several principles were developed during the consultations. These are that:

1. Tourism activity must include the full involvement of the communities and must be community-driven.
2. Tourism development should proceed in parallel.
3. The emphasis should be on high value tourism products and packages, with many involving an appropriate sharing of First Nations culture and way of life with visitors.
4. Coordination of tourism activity with tourism operators in Tofino and Ucluelet is critical, recognizing the role of these communities as gateways and staging centres to exploring the region.
5. The development of a First Nations and regional tourism marketing capacity should capitalize on technological innovations such as the full range of Internet capabilities.
6. In addition to capacity building and awareness programs for tourism, training modules should be developed based on co-operative programs with existing tourism enterprises, thereby providing young people with not only training but also experience in working with customers during the training process.

7.8 Communities Involvement

Community representatives and tourism stakeholders in the communities clearly identified that extensive capacity building/training was necessary if First Nations were to effectively participate, at all levels, in tourism. Based on the market, resource and SWOT analyses presented in this report, each community should now commence planning their involvement in tourism. This should be facilitated by undertaking an extensive tourism awareness building and community based tourism action plans.

7.9 A Framework for Guiding Tourism Development

The suggested framework for guiding tourism in the region's communities is illustrated in Exhibit 7.1. It follows the principles set out in the preceding sections and is comprised of three central components.

Community capacity building and tourism awareness. This involves preparing each community for future tourism initiatives through the delivery of human resource development and tourism awareness programs conducted within the context of individual community tourism action plan processes. Such a capacity building program would entail the delivery of community based workshops on various aspects of tourism, the creation of a vision and goals for tourism, as well as identification of local issues and concerns related to tourism. It would also involve an exploration of developmental "dos and don'ts" to ensure that cultural values and natural resources of each community are not compromised by tourism activity. Such capacity building exercises would provide the context and foundation for each community to define the products and services that could be offered and the types of infrastructure, as well as specific human resource training that they be needed to support tourism.

Product demonstrations. This involves the development of appropriate test products, which can be packaged, and offered to the marketplace on a short-term basis. These demonstration products can be used to illustrate not only the market appeal of specific types of products, but also reveal the

potential effects of such forms of tourism development on the region. They can also serve to identify the types of human resource skill requirements that other ventures of a similar type might need. By operating these test products on a "co-operative" basis with other well-developed tourism operators, First Nation trainees can gain hands on experience concerning the operation of such businesses. As well, communities can gain, both, an increased awareness of tourism's management requirements and additional revenues.

Regional support. There are several areas in which regional support is critical to facilitate and strengthen the tourism economies of each of the communities in the region. As illustrated in Exhibit 7.1, these include:

* Products – that will serve as travel generators bringing customers to the region for conversion to community tourism activities. Of course, some tourism packages that will generate travellers will be based on directly on community tourism experience.

* Infrastructure – ranging from hard infrastructure such as marine facilities to communications and training programs

* Marketing support services – including project preparation and financing for community tourism projects.

Regional Marketing Support

As envisioned at this point, eventually, the Central Region communities will have their own marketing organization to distribute their tourism products. In order to meet current and anticipated future demands, the regional marketing must incorporate a very strong technological component. Internet-based marketing is changing the dynamics of the hospitality and tourism industry dramatically. For example, the International Hotel and Restaurant Association (February, 1999) suggests that internet technological innovation will be the primary distribution channel for tourism destinations in the near future, and will reshape the way in which marketing occurs.

With the already strong international profile and image of the Clayoquot Sound, its recent Biosphere Reserve designation, and the future development of First Nation's tourism products, the region's potential competitive advantage in the marketplace will continue to expand. To support and manage this demand, a comprehensive and region wide Internet based reservations system offering not only accommodation but also travel packages, event bookings as well as other related products and services will be required. Development of such a co-ordinated system by First Nations and their partners will provide the region with a means of equitably managing the growth and distribution of tourism business in the region.

The construction such a regional marketing system based on the use of Internet technology supports the technology strategy being developed by the Ma-Mook Development Corporation. This technolgy also offers opportunities for use in the delivery of human capacity building in the areas of tourism and hospitality training.

7.10 The Advantages of a Strong Aboriginal Presence

Tourism development in the Clayoquot Sound region has evolved with concentrations in the vicinity of Tofino, and to a lesser extent Ucluelet. This evolution has occurred in the context of an

economy dominated by two sectors of forestry and fisheries. First Nation communities have, for the most part, not been participants in the region's tourism development.

The downturn in the two historically dominant sectors and the advent of "ecotourism" has provided a strong surge of interest in tourism development. This is especially so given the superb quality of the regions natural and cultural resources, and the strong emerging demand for this type of tourism.

However, there are cultural and inter-community barriers to the sustained development of this industry. Years of cultural inequity lack of trust, misunderstanding and competition between communities has left a legacy difficult to overcome.

Aboriginal people express concern about what non-Aboriginal people are doing and telling tourists about Aboriginal people in the region. With this history, and on-going examples of inequity, developing partnerships and alliances between peoples and communities does not come easily.

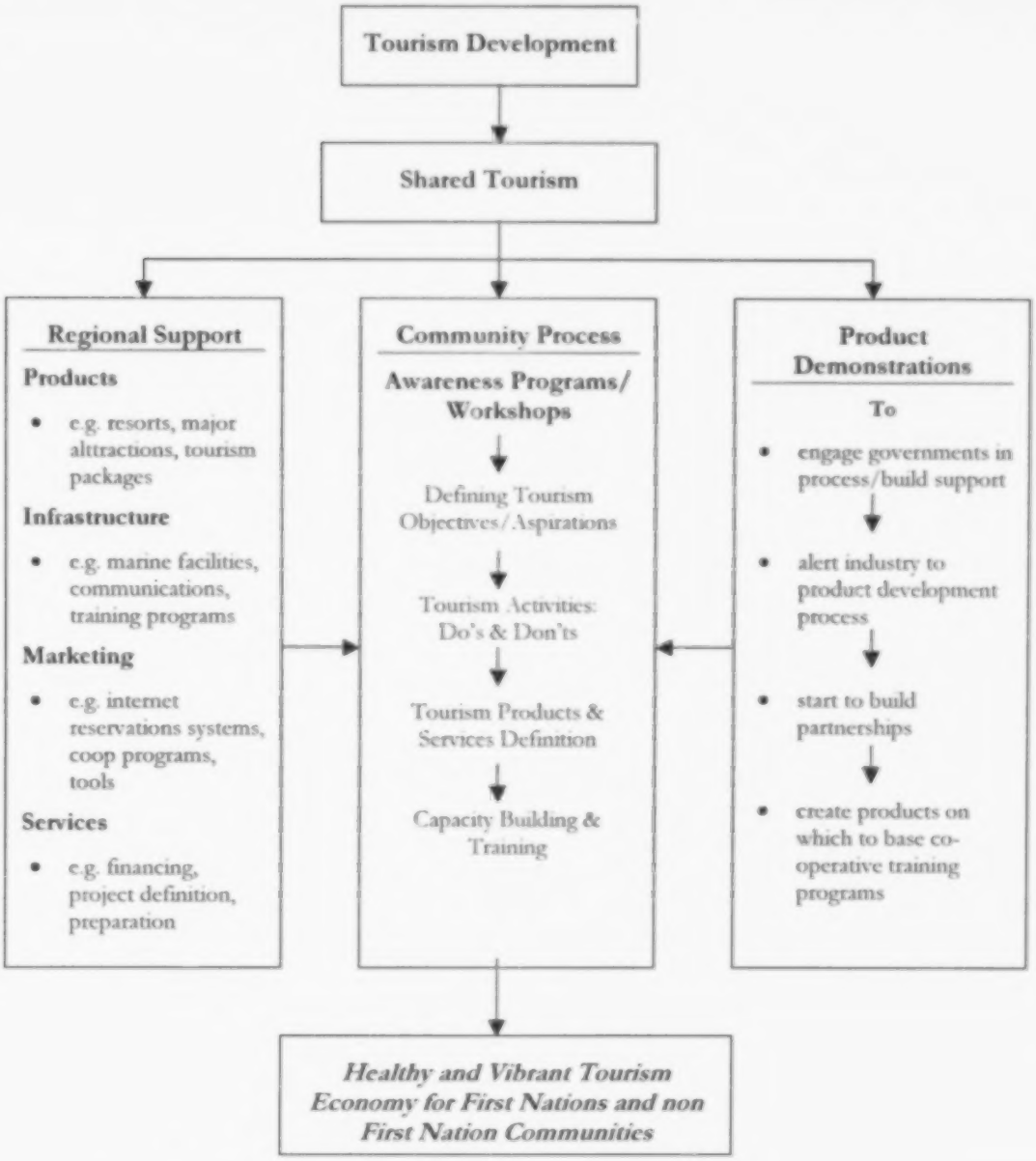
Non-Aboriginal people express a fear of the "new empowerment" of First nations people, uncertainty about the implications of future land claims, and a lack of understanding on how to best deal with these emerging realities.

Notwithstanding these realities, there is a readily apparent basis for a potentially exciting and sustainable tourism industry in the region:

- Aboriginal people (e.g. about 50% of the population), communities and traditional territories comprise a key significant component of the region's human, natural and cultural resource mix
- Aboriginal people and their knowledge of traditional lands and natural resources, as well as distinct cultural practices, provide a mix of assets which a growing number of tourism markets are seeking
- Aboriginal people wish to trust and, fairly, partner with non-Aboriginal people and communities in the development and provision of forms of tourism development which will become the economic force for all communities in the region.

Numerous consultations will stakeholders in all communities in the region, clearly suggest that "the doors are open, and the willingness is there". However, this opportunity for securing the full potential for tourism in the region will not be realised without the elimination of systemic aboriginal inequities, and the promotion of meaningful co-operative ventures. In the long term, the inherent differences in the cultures represent opportunities as opposed to barriers to the region's sustainable tourism development.

Exhibit 7.1: Framework for Guiding Tourism Development


Tourism Development
Shared Tourism
Regional Support
Products
e.g. resorts, major alttractions, tourism packages
Infrastructure
e.g. marine facilities, communications, training programs
Marketing
e.g. internet reservations systems, coop programs, tools
Services
e.g. financing, project definition, preparation
Community Process
Awareness Programs/ Workshops
Defining Tourism Objectives/Aspirations
Tourism Activities: Do's & Don'ts
Tourism Products & Services Definition
Capacity Building & Training
Product Demonstrations
To
engage governments in process/build support
alert industry to product development process
start to build partnerships
create products on which to base co-operative training programs
Healthy and Vibrant Tourism Economy for First Nations and non First Nation Communities

8. Community Profiles

8.1 First Nations Communities

8.1.1 Ahousaht First Nation

Originating from a Nuu-chah-nulth word, the name Ahousaht is thought to mean "facing opposite from the ocean" or "people living with their backs to the land and mountains". The Ahousaht First Nation's traditional home was on the western shore of Vargas Island. In 1951 the Ahousaht bands merged with the Kelsemaht bands to form the present Ahousaht First Nation. Today, they occupy 25 reserves on 592.5 hectares. The main community is Marktosis Reserve No. 15 on Flores Island, which lies off the west coast of central Vancouver Island, and is accessible only by float plane or boat.

As of November 1998, there are 1,562 members of the Ahousaht First Nation. Of these members, 568 live on Ahousaht First Nation reserves and 994 live off reserve. Following is a breakdown of band members by age, gender and type of residence.

Age	Gender	On Reserve	Off Reserve	Total
0 to 4 years	Total	72	60	132
	Male	34	29	63
	Female	38	31	69
5 to 9 years	Total	88	93	181
	Male	44	51	95
	Female	44	42	86
10 to 14 years	Total	72	127	199
	Male	36	62	98
	Female	36	65	101
15 to 19 years	Total	58	122	180
	Male	28	60	88
	Female	30	62	92
20 to 24 years	Total	43	97	140
	Male	23	38	61
	Female	20	59	79
25 to 29 years	Total	46	98	144

Age	Gender	On Reserve	Off Reserve	Total
	Male	23	46	69
	Female	23	52	75
30 to 34 years	Total	46	83	129
	Male	23	37	60
	Female	23	46	69
35 to 39 years	Total	43	80	123
	Male	25	34	59
	Female	18	46	64
40 to 44 years	Total	39	53	92
	Male	17	20	37
	Female	22	33	55
45 to 49 years	Total	23	57	80
	Male	15	29	44
	Female	8	28	36
50 to 54 years	Total	12	22	34
	Male	5	12	17
	Female	7	10	17
55 to 59 years	Total	17	18	35
	Male	9	4	13
	Female	8	14	22
60 to 64 years	Total	10	14	24
	Male	3	5	8
	Female	7	9	16
65+ years	Total	20	18	38
	Male	10	6	16
	Female	10	12	22

8.1.2 Hesquiaht First Nation

The name Hesquiaht is from a Nuu-chah-nulth word meaning "people of the sound made by eating herring eggs off eel grass". This name is explained by a traditional practice in which the people at Hesquiaht village used their teeth to separate herring eggs, considered a great delicacy, from a saltwater grass that drifts ashore in large quantities during the herring spawning season.

Hesquiaht First Nation occupies 8 reserves on 332.1 hectares. The main community is Refuge Cove Reserve No. 6, also known as Hot Springs Cove. The reserve is located on Hesquiaht Harbour on the west coast of central Vancouver Island. There is no road access, and transportation to the reserve is provided by float plane or water taxi service from Tofino.

As of November 1998, there are 561 members of the Hesquiaht First Nation. Of these members, 147 live on Hesquiaht First Nation reserves and 414 live off reserve.

Age	Gender	On Reserve	Off Reserve	Total
0 to 4 years	Total	10	33	43
	Male	5	13	18
	Female	5	20	25
5 to 9 years	Total	18	38	56
	Male	11	15	26
	Female	7	23	30
10 to 14 years	Total	20	52	72
	Male	9	31	40
	Female	11	21	32
15 to 19 years	Total	16	57	73
	Male	7	27	34
	Female	9	30	39
20 to 24 years	Total	18	38	56
	Male	9	14	23
	Female	9	24	33
25 to 29 years	Total	9	26	35
	Male	4	10	14
	Female	5	16	21
30 to 34 years	Total	8	43	51
	Male	4	20	24

Age	Gender	On Reserve	Off Reserve	Total
	Female	4	23	27
35 to 39 years	Total	12	36	48
	Male	7	13	20
	Female	5	23	28
40 to 44 years	Total	10	22	32
	Male	5	10	15
	Female	5	12	17
45 to 49 years	Total	10	21	31
	Male	7	11	18
	Female	3	10	13
50 to 54 years	Total	8	13	21
	Male	6	4	10
	Female	2	9	11
55 to 59 years	Total	4	10	14
	Male	3	4	7
	Female	1	6	7
60 to 64 years	Total	1	2	3
	Male	1	0	1
	Female	0	2	2
65+ years	Total	5	13	18
	Male	3	4	7
	Female	2	9	11

8.1.3 Tla-o-qui-aht First Nation

The Tla-o-qui-aht First Nation were formerly called Clayoquot, from a Nuu-chah-nulth word meaning "people of other tribes". The Tla-o-qui-aht currently occupies 10 reserves on 230.7

hectares. The main reserve lies between Pacific Rim National Park and Tofino. Another community is located on Meares Island. There is road and air transportation available as well as a water taxi at Opitsat.

As of November 1998, there are 727 members of the Tla-o-qui-aht First Nation. Of these members, 272 live on Tla-o-qui-aht First Nation reserves and 449 live off reserve.

Age	Gender	On Reserve	Off Reserve	Total
0 to 4 years	Total	32	33	65
	Male	18	20	38
	Female	14	13	27
5 to 9 years	Total	50	45	95
	Male	28	24	52
	Female	22	21	43
10 to 14 years	Total	42	44	86
	Male	23	26	49
	Female	19	18	37
15 to 19 years	Total	21	48	69
	Male	10	21	31
	Female	11	27	38
20 to 24 years	Total	15	39	54
	Male	4	25	29
	Female	11	14	25
25 to 29 years	Total	18	48	66
	Male	12	21	33
	Female	6	27	33
30 to 34 years	Total	30	37	67
	Male	13	13	26
	Female	17	24	41
35 to 39 years	Total	20	45	65
	Male	10	25	35
	Female	10	20	30

Age	Gender	On Reserve	Off Reserve	Total
40 to 44 years	Total	9	22	31
	Male	5	8	13
	Female	4	14	18
45 to 49 years	Total	13	15	28
	Male	9	6	15
	Female	4	9	13
50 to 54 years	Total	13	14	27
	Male	8	5	13
	Female	5	9	14
55 to 59 years	Total	10	12	22
	Male	5	7	12
	Female	5	5	10
60 to 64 years	Total	5	9	14
	Male	2	3	5
	Female	3	6	9
65+ years	Total	9	9	18
	Male	5	5	10
	Female	4	4	8

8.1.4 Toquaht First Nation

The name Toquaht is derived from a Nuu-chah-nulth word meaning "people of the narrow place in front" or "people of the narrow channel". The Toquaht First Nation occupies seven reserves on 196.4 hectares. Their main community is Macoah Reserve, on the north shore of Barkley Sound. The community is accessible by road and water. The band administration office is located in Ucluelet.

As of November 1998, there are 109 members of the Toquaht First Nation. Of these members, 11 live on Toquaht First Nation reserves and 98 live off reserve.

Age	Gender	On Reserve	Off Reserve	Total
0 to 4 years	Total	0	6	6
	Male			

Age	Gender	On Reserve	Off Reserve	Total
	Female	0 0	2 4	2 4
5 to 9 years	Total	0	7	7
	Male	0	4	4
	Female	0	3	3
10 to 14 years	Total	0	7	7
	Male	0	5	5
	Female	0	2	2
15 to 19 years	Total	1	9	10
	Male	1	5	6
	Female	0	4	4
20 to 24 years	Total	0	12	12
	Male	0	9	9
	Female	0	3	3
25 to 29 years	Total	2	11	13
	Male	2	5	7
	Female	0	6	6
30 to 34 years	Total	3	11	14
	Male	1	3	4
	Female	2	8	10
35 to 39 years	Total	0	7	7
	Male	0	3	3
	Female	0	4	4
40 to 44 years	Total	0	11	11
	Male	0	7	7
	Female	0	4	4
45 to 49 years	Total	2	2	4

Age	Gender	On Reserve	Off Reserve	Total
	Male	0	1	1
	Female	2	1	3
50 to 54 years	Total	0	3	3
	Male	0	1	1
	Female	0	2	2
55 to 59 years	Total	0	0	0
	Male	0	0	0
	Female	0	0	0
60 to 64 years	Total	3	1	4
	Male	2	0	2
	Female	1	1	2
65+ years	Total	3	6	9
	Male	3	3	6
	Female	0	3	3

8.1.5 Ucluelet First Nation

The Ucluelet are also of the Nuu-chah-nulth linguistic group. The Ucluelet First Nation occupies ten reserves on 202.5 hectares. The reserves are located 60 km east of Port Alberni on Vancouver Island's eastern coast. The main community is Ittastsoo Reserve No. 1.

As of November 1998, there are 591 members of the Ucluelet First Nation. Of these members, 227 live on Ucluelet First Nation reserves and 364 live off reserve.

Age	Gender	On Reserve	Off Reserve	Total
0 to 4 years	Total	16	37	53
	Male	8	20	28
	Female	8	17	25
5 to 9 years	Total	31	41	72
	Male	14	16	30

Age	Gender	On Reserve	Off Reserve	Total
	Female	17	25	42
10 to 14 years	Total	25	43	68
	Male	14	23	37
	Female	11	20	31
15 to 19 years	Total	18	28	46
	Male	9	16	25
	Female	9	12	21
20 to 24 years	Total	19	25	44
	Male	13	14	27
	Female	6	11	17
25 to 29 years	Total	20	37	57
	Male	10	21	31
	Female	10	16	26
30 to 34 years	Total	18	38	56
	Male	10	19	29
	Female	8	19	27
35 to 39 years	Total	19	28	47
	Male	9	13	22
	Female	10	15	25
40 to 44 years	Total	15	30	45
	Male	7	15	22
	Female	8	15	23
45 to 49 years	Total	15	18	33
	Male	8	6	14
	Female	7	12	19
50 to 54 years	Total	7	10	17
	Male	4	5	9
	Female	3	5	8

Age	Gender	On Reserve	Off Reserve	Total
55 to 59 years	Total	7	11	18
	Male	3	6	9
	Female	4	5	9
60 to 64 years	Total	6	3	9
	Male	4	3	7
	Female	2	0	2
65+ years	Total	15	9	24
	Male	7	2	9
	Female	8	7	15

8.2 Tofino

"On the edge" of Vancouver Island, the District Municipality of Tofino sits on a peninsula facing the islands of Clayoquot Sound. Tofino is 125 km west of Port Alberni by highway. The municipality was incorporated in 1932, comprising a total area of 1940.6 ha. The municipality is named after Rear Admiral Tofino, a prominent mathematician and astronomer of the Spanish Navy.

Tofino is a small town with a significant growth rate. The population was estimated to be 1479 people in 1999, based on 1996 census data. For Tofino, 1999 marked the fourth consecutive year of population growth greater than 5% (BC STATS). The following exhibit provides a comparison of the relative percentage distribution of the population by age and gender in Tofino, compared to the entire province of British Columbia. .

	Male	Female	Tofino % Distribution	British Columbia % Distribution.
All ages	580	590	100	100
0-14	120	110	19.2	19.7
15-24	85	105	16.2	13.0
25-44	205	220	36.8	32.7
45-64	135	120	21.8	21.8
65+	25	35	6.0	12.8

(Statistics Canada)

In 1996, the labour force consisted of 815 people in Tofino. The employment / population ratio of 78.6 was considerably higher than Ucluelet (68.8) or the provincial average (60.0) (Statistics Canada).

The unemployment rate for Tofino was 7.4% during that period. The unemployment rate for the Vancouver Island / Coast region of BC was 6.7% in 1999. Employment has been increasing in this region, resulting in one of the lowest unemployment rates of any region in BC. Exact rates for Tofino may be lower because of an increasingly diverse economy fuelled by growth in the tourism industry. Construction, retail trade and services were strong growth industries during the 1990's.

The peak tourism season for Tofino is March – August, though winter storm watching and more economical shoulder season travel are increasingly common. There are a variety of tourism products and services established (approx. number of operators): restaurants, cafes and bakeries (30); motel/resorts (40); bed and breakfast (64); campgrounds/hostels (8); air, water and land transportation (13); charter boat operations (24) - whale watching, fishing, diving, Hot Springs Cove, nature trails, kayaking; Pacific Rim National Park; guides and services for water activities – kayaking (5), surfing (4), sailing, motor boating, scuba diving; Fishing Related; Commercial fishing boats; Fish processing plants; Fish farms (5); Artists and art galleries (17). (Tofino-Long Beach Chamber of Commerce). Occupancy rates for hotels on Vancouver Island were 83.8% in 1999, higher than the provincial average of 79.6% (BC The tourism industry (comprised of accommodation, food and beverage) employed the most people (23.3%) in Tofino in 1996, followed by retail trade (12.9%) and construction (10.4%). Primary industries such as fishing and trapping (6.1%) and logging and forestry (3.1%) have contributed much less to the area's economic base in that same period.

8.3 Ucluelet

Ucluelet has an intriguing history of human settlement. The Nuu-cha-nulth people were the first to recognize Ucluelet Inlet as "yu-clutl-ahts" a "good landing place for canoes". A gateway to the Long Beach and Broken Group Islands of Pacific Rim National Park Reserve, Ucluelet may be accessed by highway, 99 km west of Port Alberni, 42 km south-east of Tofino or by ferry from Port Alberni. The village of Ucluelet was incorporated in 1952 with a total area of 1143.6 ha.

Based on an extrapolation of 1996 census data, the population of Ucluelet was estimated to be 1764 people in 1999. The following exhibit (X) provides a percentage distribution of the population by age and gender, compared to the entire province of British Columbia.

	Male	Female	Ucluelet % Distribution	British Columbia % Distribution
All ages	680	795	100	100
0-14	185	195	23.3	19.7
15-24	120	110	13.9	13.0
25-44	310	295	36.6	32.7
45-64	185	140	19.6	21.8
65+	50	60	6.0	12.8

(Statistics Canada)

The industry employing the most people in Ucluelet in 1996 was manufacturing (18.4%), followed by accommodation, food and beverage (15.3%) and logging and forestry (11.2%). Government service and retail trade also comprised about 10% each of the community's labour force (Statistics Canada).

The labour force in Ucluelet (1996) was 980 people, for an employment/population ratio of 68.8 (Statistics Canada). The unemployment rate for Ucluelet was 12.2% in 1996. The level of unemployment rate was largely attributable to substantial downturns in the region's fishing and trapping industries during this period. (BC STATS)

The peak season for Ucluelet's tourism industry is summer, but grey whale migration to the area attracts many visitors during the spring. There are a variety of tourism products and services established in the community. These include restaurants, cafes and bakeries (5); motels/resorts, bed and breakfast, campgrounds (33); air, water and land transportation (3); charter boat operators, guides and services for water activities such as kayaking, whale watching, fishing, diving surfing, sailing, motorboating, scuba diving, nature walks (16); art galleries, as well as gift and souvenir shops (4) (Ucluelet Chamber of Commerce). Specific occupancy rates for the accommodation properties are not available (BC STATS).

9. Vancouver Island Tourism

In terms of regional visitation, Vancouver Island is second only to the Vancouver Coast & Mountains region, attracting 32% of all visitors to BC. BC residents and non-residents are both important source markets for tourism on Vancouver Island. A recent destination study prepared by Tourism British Columbia reported that nearly 10 million visitors travelled to Vancouver Island for a day or overnight trip in 1995/96. Of these visitors, 5.413 million were BC residents[1] and 4.485 were non-residents of BC (Tourism BC, 1998).

The following sections provide information on tourism for Vancouver Island as a whole as well as for the Island's West Coast region (Port Alberni, Tofino and Ucluelet area). The Tourism BC study is the best and only source of information for overall tourism to Vancouver Island. For the West Coast region, the Tourism BC study is used as well as other relevant studies and data.

The primary focus of the Tourism BC study was to profile the overnight visitor to BC. Consequently, with the exception of average length of stay, the sections on visitors to Vancouver Island as a whole provide information only on the overnight resident and non-resident visitor. Because of the relatively great distance to the West Coast region, it is unlikely that day visitors will be major source market for Ma-Mook Development Corporation tourism.

The Tourism BC study did not provide a breakdown of the proportion of day visitors to overnight visitors for either the resident or the non-resident market to Vancouver Island. However, it is estimated that 68% (20.852 million) of the total 30.602 million day and overnight visitors to British Columbia in 1995/96 were overnight visitors (Tourism BC, 1998). A similar breakdown between day and overnight visitors is assumed for both BC resident and non-resident visitors to Vancouver Island. Based on this assumption, in 1995/96 there were 3.681 million BC residents and 3.05 million non-residents who took an overnight trip in BC and visited Vancouver Island while on their trip.

9.1 BC Resident Market

9.1.1 Market Origins

The following table provides a breakdown of the market origins of the 3.681 million BC residents who took an overnight trip in BC and visited Vancouver Island in 1995/96. It shows that Vancouver Island supplies more than half (52%) of all resident visitors, followed by the Greater Vancouver Regional District (GVRD)(33%), South BC (13%) and North BC[2] (3%). South BC refers to the following regions: Vancouver Coast and Mountains, excluding GVRD, South & North Thompson-Okanagan, West BC Rockies, Cariboo and East BC Rockies. North BC refers to the remaining northern regions.

[1] All Tourism BC figures on BC resident visitors refer to visitors who travelled 80km or more one way for a day or overnight trip in the province (ie. excludes local population).

[2] It should be noted that no information is provided on the market characteristics of visitors from North BC because the sample size is too small to permit detailed analysis.

Market Origin of BC Resident Visitors

Origin	Visitors	%
Vancouver Island	1,914,000	52%
Greater Vancouver Regional District (GVRD)	1,215,000	33%
South BC	479,000	13%
North BC	11,000	3%
Total*	3,681,000	100%

* Numbers may not add up due to rounding

Source: Tourism BC, 1998

9.1.2 Sociodemographics

The gender split is about 50/50 for BC resident visitors who took an overnight trip in BC and visited Vancouver Island while on their trip. The following table provides additional information on the sociodemographics. In terms of average age, visitors from South BC are somewhat younger at 40 years than either Vancouver Island or GVRD visitors, which both have an average age of 44. Approximately two-thirds of both Vancouver Island and GVRD visitors are 35 years or older (67% and 65%, respectively), with those from the GVRD more likely to 55+ years (28%). For the South BC market, most of the visitors are 18 to 34 years (43%), followed by the 35 to 54 years group (37%) and the 55+ group (20%).

Overall, BC resident visitors are well educated. GVRD visitors have the highest level of education, with 72% having at least some post-secondary education, followed by South BC visitors and Vancouver Island visitors (61% and 57%, respectively).

The majority of resident visitors are from middle and upper income brackets. About one-half of the visitors from the Island, the GVRD and South BC are from middle income households (48%, 47% and 47%, respectively). Compared to the other two markets, more GVRD visitors are from upper income households (25% vs. 17% for Vancouver Island and 21% for BC South), and fewer of those visitors are from lower income households (27% vs. 32% for the Island and 32% for BC South).

Sociodemographics of BC Resident Visitors

Characteristic	Vancouver Island	GVRD	South BC
Age			
18-34	33	34	43
35-54	43	37	37
55+	24	28	20
Mean Age	44	44	40

Education			
At least some post- secondary education	57	72	61
High school or less	43	28	39
Household Income ($CDN)			
< $40,000	35	27	32
$40,000 to $80,000	48	47	47
> $80,000	17	25	21

Source: Tourism BC, 1998

9.1.3 Trip Characteristics

Relevant trip characteristics for BC resident visitors to Vancouver Island are summarized below (Tourism BC, 1998):

Average Length of Stay – For day and overnight resident visitors, the average length of stay in BC was 2.9 days.

Seasonality – The following table provides information on the seasonal travel patterns of overnight resident visitors. It shows that the majority of BC residents favour summer travel, but that winter travel is also popular.

Season of Travel	Vancouver Island (%)	GVRD (%)	South BC (%)
Spring (April and May)	15	15	16
Summer (June to September)	46	44	40
Fall (October and November)	12	12	18
Winter (December to March)	27	29	27

Travel Party – With the exception of the South BC visitor, who travels in a larger group while on business (3.7 party size vs. 2.7 party size for South BC leisure and overall travellers), the following table shows that there are virtually no differences in average party size between overall, leisure and business resident travellers for each source market. On average, overnight resident visitors travelled in groups of 2.8 people. Island residents travelled in the largest parties (3.0 people), followed by South BC residents (2.7 people) and GRVD residents (2.6 people).

Average Party Size	Vancouver Island (%)	GVRD (%)	South BC (%)
Overall	3.0	2.6	2.7
Leisure Visitor	3.0	2.6	2.7
Business Visitor	2.9	2.5	3.7

As per the following table, more than 60% of overnight resident travel parties are composed of two or more adults. Couples are the most popular party composition, comprising more than 43% for all three markets.

Party Composition	Vancouver Island (%)	GVRD (%)	South BC (%)
Alone	13	25	21
Two adults/no children	44	43	43
Three+ adults/no children	20	20	18
One adult with children	4	1	3
Two+ adults with children	18	11	15

Trip Planning & Booking – The following table shows that most BC residents did not use any information sources either before or during their trip in BC. For those who did, the most popular sources of information were the recommendations of friends, relatives and others as well as brochures/books.

Sources of Information*	Vancouver Island (%)	GVRD (%)	South BC (%)
Friends, relatives, clubs, associates	11	12	12
Travel agents, airlines, auto associations	3	1	5
Brochures/books	12	12	13
Tourism BC 1-800 numbers	7	9	9
Travel information centres	4	4	5
Media coverage	2	2	2
Advertising (print/TV)	3	1	3
Tour operators/tourism-specific businesses	2	2	2
BC tourism associations	3	3	1
No sources used	56	43	47

* Multiple responses allowed; reflects sources of information used both prior to and during trip.

More than 90% of all resident visitors planned their trip within two weeks of travel, with about two thirds making their decision within one week of travel. This relatively short time frame is no doubt a reflection of the short travel distance involved in resident trips.

Trip Planning	Vancouver Island (%)	GVRD (%)	South BC (%)
Less than one week	67	69	63
One to two weeks	25	22	30
Two to four weeks	4	4	5
One to two months	4	5	2

In keeping with their short trip planning time frame, more than 80% of BC residents booked their travel arrangements within one week of travel.

Trip Booking	Vancouver Island (%)	GVRD (%)	South BC (%)
Less than one week	78	81	89
One to two weeks	17	13	9
Two to four weeks	4	5	1
One to two months	1	2	-

Accommodation Type – As the following table shows, private homes/cottages are by far the most favoured type of accommodation for BC residents while on Vancouver Island. Hotels are the second most popular, followed by motels, while only small percentages of visitors use other types of accommodation such as bed and breakfasts and campgrounds.

Accommodation[x]	Vancouver Island (%)	GVRD (%)	South BC (%)
Private home/cottage of friend/relative	50	60	70
Hotel	19	22	17
Motel	15	9	7
Resort	1	*	-
Bed and Breakfast	3	4	5
National/Provincial Park Campground	4	3	1
Cruise ship/charter/rental boat	*	1	-

x Multiple responses allowed

* Less than 1%

Activities – While on Vancouver Island, more than 95% of all overnight BC resident travellers spent time visiting friends and relatives. Wildlife viewing was also a popular activity for both Vancouver Island and GVRD residents (94% and 97%, respectively) while on Vancouver Island.

Further insight into the activity preferences of BC residents is provided by survey results, as summarized in the following table, on the most popular activities participated in while on an overnight trip in the province. To begin with, the survey revealed that most BC residents participate in city/town activities, such as dining out, shopping and nightlife, while travelling in the province (82% of Vancouver Island, 87% of GVRD and 92% of South BC residents).

Outdoor activities are also popular. About 50% of resident travellers participate in land-based activities, with 25% or more of all three resident markets participating in visiting parks, wildlife viewing/bird watching and hiking/backpacking.

More than 40% of all resident travellers visit attractions while on their trip, with about one-quarter visiting historic sites and art galleries/museums. A significant percentage of BC residents (16% or more of all three markets) also enjoy visiting aboriginal cultural sites.

Activities in the Province*	Vancouver Island (%)	GVRD (%)	South BC (%)
City/Town Activities			
(Net) City/town activities	82	87	92
Dining out in restaurants	69	77	85
Shopping	58	48	64
Nightlife/entertainment	21	16	30
Outdoor Activities			
(Net) Land-based activities	53	50	46
Visiting National/Provincial park	32	30	24
Wildlife viewing/bird watching	35	32	24
Hiking/backpacking	26	25	29
Fishing	11	11	6
Golfing	6	8	8
Photography	35	40	50
Sightseeing	53	55	51
Boating	11	10	11
Attractions/Culture/Events			
(Net) Events	13	12	13
Local festivals/fairs/events	13	12	13
(Net) Attractions	41	43	44
Zoos/natural displays/gardens	15	22	17
Historic sites	24	23	25
Art galleries/museums	19	25	24
Native (Indian) cultural sites	17	17	16

* Multiple responses allowed

9.2 Non-resident Market

The following table provides a breakdown of the market origins of the 3.05 non-residents of BC who took an overnight trip in BC and visited Vancouver Island in 1995/96. It shows that the Regional Canada (Alberta, Saskatchewan, Manitoba and the Territories) and US (Washington, Idaho, Montana, Oregon and Alaska) markets are extremely important markets, supplying 44% of total

non-resident visitors. Asia Pacific and Europe are the key non-resident overseas markets[3], with each having an 8% market share.

Market Origins of Non-resident Visitors

Origin	Visitors	%
Regional Canada	854,000	28
Regional U.S.	488,000	16
Long Haul Canada	549,000	18
Long Haul U.S.	671,000	22
Asia/Pacific	244,000	8
Europe	244,000	8
Other Overseas	31,000	1
Total*	3,050,000	100.0

* Numbers may not add up due to rounding

Source: Tourism BC, 1998.

9.3 Sociodemographics

The gender split is about 50/50 among non-resident visitors. The table following provides information on the sociodemographics of non-resident visitors who were overnight visitors to BC and visited Vancouver Island while on their trip. In terms of average age, the Long Haul Canada and US non-resident markets are slightly older (51 years and 50 years, respectively) than the Regional Canada and US markets (47 years and 49 years, respectively). European visitors are somewhat younger than all of the Canadian and US markets, with an average age of 44. With an average age of 40, Asia/Pacific is the youngest source market overall.

For the Regional Canada and US market as well as the long haul US market, most visitors are 35 to 54 years (46% and 45%, respectively), followed by the 55+ years group (32% and 35%, respectively) and the 18 to 34 years group (21% and 20%, respectively). Compared to the regional markets, the Canadian and US Long Haul market are older, with only 14% and 13%, respectively, being 18 to 34 years. Most US Long Haul visitors are 35 to 54 years (47%), while most Long Haul Canadian travellers are 55+ years (44%).

[3] It should be noted that no information on the market characteristics of Other Overseas visitors is provided because of the very small sample size.

Sociodemographics of Non-resident Visitors						
Characteristic	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Age						
18-34	21	20	14	13	33	42
35-54	46	45	42	47	38	38
55+	32	35	44	40	29	20
Mean Age	47	49	51	50	44	40
Education						
At least some post-secondary educ'n	88	95	88	93	82	88
High school or less	12	5	12	7	18	12
Household Income ($CDN)						
< $40,000	29	9	26	3	16	27
$40,000 to $80,000	45	43	33	39	43	34
> $80,000	26	48	41	58	41	39

9.3.1 Trip Characteristics

Relevant trip characteristics for non-residents of BC who visited Vancouver Island are summarized below (Tourism BC, 1998):

Average Length of Stay – The average length of stay in BC was 5.1 days for both day and overnight non-resident visitors.

Seasonality – The seasonal travel patterns of non-resident visitors are summarized in the following table. It shows that about three-quarters of Long Haul US and European travellers prefer to visit BC and Vancouver Island in the summer, and that all of the market segments visit primarily during the peak summer months. With the exception of Asia/Pacific travellers whose second preference is spring, winter is the second most favoured season of travel for all of the source markets.

Season of Travel	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Spring (April and May)	11	15	9	8	6	17
Summer (June to September)	51	60	54	75	78	58
Fall (October and November)	11	8	15	5	7	11
Winter (December to March)	28	17	22	12	9	13

Travel Party – On average, non-resident visitors to BC and Vancouver Island travel in groups of 2.1 people. Asia/Pacific business travellers travel in larger parties (3.2 people), while Regional US business travellers travel in smaller parties (1.5 people).

Average Party Size	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Overall	2.0	2.4	1.7	2.3	2.1	2.0
Leisure Visitor	2.1	2.5	1.8	2.4	2.1	1.9
Business Visitor	1.7	1.5	1.7	2.0	2.1	3.2

Couples are the most favoured travel party composition for the Regional and Long Haul US markets as well as the European market (49%, 51% and 54%, respectively). Visitors from the other three markets are more likely to travel alone. More than one-half of both Long Haul Canada travellers (57%) and Asia/Pacific travellers (53%) and 42% of Long Haul travellers travel alone.

Party Composition	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Alone	42	26	57	26	31	53
Two adults/no children	38	49	32	51	54	32
Three+ adults/no children	6	11	4	11	8	5
One adult with children	4	2	1	2	*	4
Two+ adults with children	10	12	6	11	6	5

* Less than 1%

Trip Planning & Booking – For non-residents, the Tourism BC study collected information on sources of information used prior to taking their BC trip as well as those used during the trip. The following table shows the pre-trip sources used. The preferred source of information for the Long Haul Canada, Long Haul US and Asia/Pacific markets is travel agents/airlines (77%, 80% and 82%, respectively). These markets also rely heavily on brochures/books and the recommendations of relatives and friends.

In the case of Regional US and European travellers, brochures/books are the number one source of information (70% and 72%, respectively), followed by travel agents/airlines (48% and 69%, respectively) and word of mouth (39% and 41%, respectively). The Regional Canada market relies mainly on word of mouth (65%) or travel agents/airlines (56%) for pre-trip information.

Sources of Information Before BC Trip[x]	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Friends, relatives, clubs, assoc.	65	39	52	42	41	51
Travel agents, airlines, auto associations	56	48	77	80	69	82
Brochures/books	26	70	52	56	72	63
Tourism BC 1-800 numbers	21	35	16	18	2	*
Travel information centres	6	5	8	16	10	5
Media coverage	10	35	20	29	51	18
Advertising (print/TV)	7	16	18	21	10	4
Tour operators/tourism-specific businesses	3	15	10	19	23	10
BC tourism associations	1	4	*	4	2	*

x Multiple responses allowed
* Less than 1%

In terms of the sources of information used during the trip, only the Regional Canada and Long Haul US markets had sample sizes large enough to be valid. Brochures/books were used by 73% of visitors from both markets. Travel infocentres were another primary source of information, but multiple other sources were also used.

Sources of Information*	Regional Canada (%)	Long Haul US (%)
Friends, relatives, clubs, associates	35	18
Travel agents, airlines, auto associations	33	35
Brochures/books	73	73
Tourism BC 1-800 numbers	10	10
Travel information centres	47	39
Media coverage	28	16
Advertising (print/TV)	7	20
Tour operators/tourism-specific businesses	9	30
BC tourism associations	6	8

* Multiple responses allowed

With the exception of the European traveller, the majority of non-resident visitors to BC and Vancouver Island book their travel arrangements within three months of travel, with the one to three month time frame being the most common. European travellers tend to plan farther ahead, with 63% taking more than three months and 44% taking more than six months.

Trip Planning	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Less than one month	30	24	15	24	13	20
One to three months	40	34	45	33	23	33
Three to six months	14	15	22	22	21	22
More than six months	16	26	18	21	44	24

Similar to trip planning, except for European travellers, the majority of non-resident visitors to BC and Vancouver Island book their travel arrangements within three months of travel. Compared to all others, and in keeping with the shorter distance involved, both regional markets are more likely to book within one month of travel. In keeping with their longer trip planning horizon, European visitors are more likely to book their trip within three to six months of travel, and almost one quarter of them book more than six months in advance.

Trip Booking	Regional Canada (%)	Regional US (%)	Long Haul Canada (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
Less than one month	48	49	36	39	22	31
One to three months	40	26	36	37	22	42
Three to six months	8	13	15	15	34	17
More than six months	5	11	4	9	23	10

Accommodation Type – The following table provides information on the types of accommodation used by non-resident visitors while on Vancouver Island. It shows that for the overall non-resident market as well as the Regional Canada market, private homes/cottages are the most popular type of accommodation (38% and 52%, respectively), followed by hotels (31% and 28%, respectively). In the case of the Regional US market, hotels are the most favoured accommodations (31%), followed by motels (20%).

Accommodation[x]	Non-resident total (%)	Regional Canada (%)	Regional US (%)
Private home/cottage of friend/relative	38	52	12
Hotel	31	28	31
Motel	11	8	20
Resort	2	4	2
Bed and Breakfast	3	3	4
National/Provincial Park Campground	2	*	2
Cruise ship/charter/rental boat	1	-	4

x Multiple responses allowed

* Less than 1%

\- Not asked/no answer

Activities – As per the following table, while on Vancouver Island, non-resident visitors participate in various activities, including:

- 44% of all non-resident travellers spend time city/town sightseeing and visiting zoos/natural displays and gardens. Visiting art galleries/museums (32%) and casual walking (20%) are also popular activities.
- Regional Canadian travellers most enjoy participating in city/town sightseeing (41%), visiting zoos/natural displays/gardens (38%), visiting art galleries/museums/exhibits (35%), casual walking (20%), and visiting friends and relatives (20%).
- Regional US travellers prefer city/town sightseeing (32%), visiting zoos/natural displays and art galleries/museums (27% each) and casual walking (20%). They are the most likely to participate in outdoor activities such as lake boating (17%), freshwater fishing (14%), and hiking/ backpacking (13%).
- Long Haul US travellers most favour visiting zoos/natural displays (56%), followed by city/town sightseeing (41%), visiting art galleries/museums (36%) and casual walking (17%).

Activities on Vancouver Island[x]	Non-resident total (%)	Regional Canada (%)	Regional US (%)	Long Haul US (%)
City/town sightseeing	44	41	32	41
Zoos/natural displays/gardens	44	38	27	56
Art galleries/museums/exhibits	32	35	27	36
Travelling	17	22	9	7
Casual walking	20	20	25	17
Visiting friends & relatives	14	20	3	3
Shopping	13	11	15	11
Hiking/backpacking	11	11	13	8
Resting/relaxing	8	8	14	3
Historic sites	8	6	6	13
Lake boating (sail/power)	7	2	17	2
Freshwater fishing	4	2	14	2
Visit National/Provincial Park	1	3	-	-
Wildlife viewing	1	3	1	1

x Multiple responses allowed

* Less than 1%

\- Not asked/no answer

Further insight into the activity preferences of non-residents is provided by survey results, as summarized in the following table, on the most popular activities participated in while on an overnight trip in the province. Virtually all non-residents participate in city/town activities, with all activities except nightlife entertainment showing participation rates of about 80% or higher for all market segments.

Outdoor activities, especially land-based activities, are also very popular among non-resident visitors. Overall land-based activities participation rates are high for all markets, with the European markets being particularly high (93%). Across the segments, the most favoured outdoor activities include visiting national parks, photography and wildlife viewing/bird watching and hiking/backpacking. The Regional Canadian and European markets show moderate to high participation rates in many outdoor activities.

At least 75% of non-resident visitors also visit attractions during a trip in BC. The attractions taken in by most visitors are zoos/natural displays/gardens, followed by historic sites, followed by art

galleries/museums. Aboriginal cultural sites are also very popular, especially among the European, Long Haul US and Asia/Pacific markets (participation rates of 61%, 42% and 38%, respectively).

Activities in the Province*	Reg'l Can (%)	Reg'l US (%)	Long Haul Can (%)	Long Haul US (%)	Europe (%)	Asia/ Pacific (%)
City/Town Activities						
(Net) City/town activities	96	93	97	97	99	95
Dining out in restaurants	88	90	94	92	88	75
Sightseeing in city/town	82	88	90	93	79	92
Shopping	86	79	83	88	88	89
Nightlife/entertainment	37	29	40	39	22	29
Outdoor Activities						
(Net) Land-based activities	63	55	59	71	93	73
Visiting National/Prov'l park	54	38	48	59	90	66
Wildlife viewing/bird watching	45	26	29	43	71	39
Hiking/backpacking	32	15	20	17	35	26
Exploring backcountry/wilderness	26	8	12	13	29	9
(Net) Marine-based Activities	37	21	9	16	33	9
Whale watching	25	12	6	12	27	8
Ocean boating (sail/power)	19	11	4	7	7	4
Freshwater boating	22	2	6	6	19	4
Winter activities	14	1	2	3	5	18
Fishing	15	11	2	7	17	4
Swimming	36	19	21	14	24	20
Golfing	23	6	22	6	1	9
Photography	57	49	53	56	76	58
Attractions/Culture/Events						
(Net) Events	45	26	35	26	23	33
Local festivals/fairs/events	24	19	28	19	15	20
Sporting events	27	4	14	5	12	21

(Net) Attractions	76	90	81	94	89	85
Zoos/natural displays/gardens	59	66	72	88	75	67
Historic sites	45	60	62	74	62	59
Art galleries/museums	33	67	45	67	43	46
Native (Indian) cultural sites	29	25	29	42	61	38
Amusement/theme park	29	17	18	15	9	26
Wineries/farm tours	19	4	16	6	16	18

* Multiple responses allowed

9.3.2 Tourism in the West Coast Region

The following table provides estimates of the number of resident and non-resident visitors who travelled to Vancouver Island's West Coast in 1995/96. These estimates are based on the estimates derived above for the number of residents and non-residents who visited Vancouver Island in 1995/95 and Tourism BC's estimates of the percentages of visitors who visited the Island's West Coast in that year.

Estimated Market Size for West Coast Region – 1995/96

Origin	Visitors to Vancouver Island[1]	% Visiting West Coast Region[2]	Visitors to West Coast Region
Residents*			
Vancouver Island	1,914,000	12%	230,000
Greater Vancouver Regional District (GVRD)	1,215,000	18%	219,000
South BC	479,000	9%	43,000
Sub-total			***492,000***
Non-residents**			
Regional Canada	854,000	11%	94,000
Regional US	488,000	12%	59,000
Long Haul Canada	549,000	14%	77,000
Long Haul US	671,000	8%	54,000
Europe	244,000	37%	90,000
Sub-total			***374,000***
TOTAL[3]			**866,000**

* Insufficient sample size to report North BC visitors to West Coast region

** Insufficient sample sizes to report Asia/Pacific visitors or Other Overseas to West Coast region

1. Source: ARA estimates
2. Source: Tourism BC, 1998

The estimates show that there were about 866,000 visitors to the West Coast region in 1995/96. The most important resident market is Vancouver Island, followed by the GVRD. The most important resident market is Regional Canada, followed by Europe and Long Haul Canada. It is interesting to that almost 40% of European visitors to Vancouver Island visit the West Coast Region. Given their high level of interest in the region and their well-known interest in aboriginal culture, the European market will be a key source market for Ma-Mook Development Corporation.

Using the estimates of resident and non-resident visitation to the area and applying the only available set of growth rates (prepared by Tourism BC and referring to overnight visitors to BC), visitor estimates and forecasts have been prepared for the period from 1997 to 2003 (table following). The forecasts show steady growth for the BC resident market and stronger growth for the non-resident market. By 2003, it is estimated that the West Coast region will attract about one million visitors annually.

Approximate Size of the Available Market for West Coast Region – 1995/96 to 2003

Market size by origin	*Actual*			*Forecast*				
BC visitors (Tourism BC)								
Annual % change in o'nite visitors to BC		**95/6-97**	**97-98**	**98-99**	**99-00**	**00-01**	**01-02**	**02-03**
- BC resident (net)*		-1.0%	0.0%	1.0%	1.5%	1.5%	1.5%	2.0%
- Non-BC resident		5.7%	1.8%	2.3%	2.6%	2.7%	2.7%	2.8%
- Total visitors		2.2%	0.9%	1.6%	2.1%	2.1%	2.1%	2.4%
West Coast Region Visitors (ARA estimates)**								
Visitor volumes	**95/96**	**1997(E)**	**1998 (E)**	**1999**	**2000**	**2001**	**2002**	**2003**
- BC resident (net)	492,000	487,080	487,080	491,951	499,330	506,820	514,422	524,711
- Non-BC resident	374,000	395,318	402,434	411,690	422,394	433,798	445,511	457,985
Total (net)	*866,000*	*882,398*	*889,514*	*903,640*	*921,724*	*940,618*	*959,933*	*982,696*

* Tourism BC figures refer to visitors who travelled 80 km or more one way from home for a day or overnight trip (ie. excludes local population)

Source: ARA review of Tourism BC statistics and forecasts

Assessing vehicular traffic into Tofino and Ucluelet provides a further indication of strong tourism activity in the region. The following table provides average daily, summer average daily, average weekday and average weekend traffic counts into both communities in 1998. It shows that there is significant vehicular traffic into both communities, particularly during the peak summer months.

Average In-bound Traffic to Tofino and Ucluelet (1998)

Traffic Measurement Point	Annual Average Daily Traffic	Summer Average Daily Traffic (July & August)	Annual Average Weekday Daily Traffic	Annual Average Weekend Daily Traffic
To Tofino via Highway 4 West	474	926	465	486
To Ucluelet via Highway 4 West	382	641	388	366

Source: BC Ministry of Transportation and Highways, 1999

An indication of the proportion of vehicles that are tourist vehicles may be provided by the attendance equation developed by Pacific Rim National Park Reserve in 1998 (Canadian Heritage, 1998). The Park calculates the annual number of visitor parties (vehicles) by multiplying the total number of vehicles entering the Park by an adjustment factor that determines the number of in scope vehicles (0.98) by the average proportion of visitor to non-visitor vehicles (60.3%).

The attendance formula therefore takes the following form:

Number of Visitor Parties = Total Number of Vehicles X 0.98 X 0.603

Applying this equation and the BC Highways annual average daily traffic counts, the following estimates of tourist vehicles for 1998 are derived:

Number of tourist vehicles to Tofino: 474 X 0.98 X 0.603 X 365 days = 102,239

Number of tourist vehicles to Ucluelet: 382 X 0.98 X 0.603 X 365 days = 82,395

Insight into the market characteristics of visitors to the West Coast region is provided by the following studies related to tourism activity in the area:

- Pacific Rim National Park Reserve – *Long Beach Unit Exit Survey - 1994* and *Long Beach Unit Exit Survey - 1996*;
- Pacific Rim Tourism Association – *Cathedral Grove Visitor Exit Survey - 1996*; and
- BC Ministry of Small Business, Tourism and Culture – *Clayoquot Sound Tourism and Recreation Visitor Survey - 1997.*

The following table summarizes the relevant information collected by these studies.

Market Characteristics of Visitors to West Coast Region

Market Origins				
Study	***Visitor Origins***			
Long Beach Unit – 1994	• Local area - 9% • Other BC – 45% • Alberta – 10% • Other Canada - 13%		• USA – 9% • Germany – 6% • Other overseas – 8%	
Long Beach Unit - 1997	• Local area – 7% • Other BC – 44% • Other Canada – 19%		• USA – 10% • Europe – 17% • Other overseas – 3%	
Cathedral Grove - 1996	• Vancouver Island/Gulf Islands – 10% • GVRD – 10% • Other BC – 7% • Alberta – 18% • Ontario – 15% • Other Canada – 10%		• USA – 13% • United Kingdom – 6% • Germany – 4% • Other Europe – 3% • Other overseas – 5%	
Clayoquot Sound – 1997	No information			
Sociodemographics				
Study	***Age***	***Education***	***Annual Household Income***	
Long Beach Unit Exit Survey – 1994	• Under 18 years – 15% • 18 to 24 years – 10% • 25 to 34 years – 21% • 35 to 49 years – 26% • 50 to 65 years – 20% • Over 65 years – 8%	• High school or less – 29% • College/tech school – 23% • Some university – 8% • University grad – 39%	• Under 25,000 – 10% • 25,000 to 34,999 – 9% • 35,000 to 44,999 – 11% • 45,000 to 54,999 – 12% • 55,000 to 64,999 – 12% • 65,000 to 74,999 – 10% • Over 75,000 – 27% • No response – 10%	
Long Beach Unit Exit Survey – 1997	• Under 18 years – 19% • 18 to 24 years – 10% • 25 to 34 years – 19% • 35 to 49 years – 28% • 50 to 65 years – 19% • Over 65 years – 5%	• High school or less – 26% • College/tech school – 19% • Some university – 7% • University grad – 50%	• Under 25,000 – 3% • 25,000 to 34,999 – 3% • 35,000 to 44,999 – 8% • 45,000 to 54,999 – 14% • 55,000 to 64,999 – 20% • 65,000 to 74,999 – 17%	

			• Over 75,000 – 21% • No response – 13%
Cathedral Grove Exit Survey – 1996	No information	No information	• Under 20,000 – 8% • 20,000 to 39,999 – 13% • 40,000 to 59,999 – 17% • 60,000 to 78,999 – 12% • Over 79,000 – 22% • No response – 28%
Clayoquot Sound Visitor Survey – 1997	• 18 to 24 years – 21% • 25 to 34 years – 27% • 35 to 44 years – 26% • 45 to 54 years – 18% • 55 to 64 years – 6% • Over 64 years – 3%	• High school or less – 16% • Technical/trade college – 7% • Some college/university – 21% • College/university grad – 56%	• Under 20,000 – 22% • 20,000 to 39,999 – 19% • 40,000 to 59,999 – 19% • 60,000 to 79,999 – 14% • Over 80,000 – 27%

Trip Characteristics

Study	*Trip Duration*	*Travel Parties*	*Information Sources*
Long Beach Unit Exit Survey – 1994	Time spent in Park (non-local visitors): ▪ 1 day or less – 57% ▪ 2 days – 27% ▪ 3 days – 8% ▪ 4 days or more – 8%	▪ Average 2.6 people	▪ No information
Long Beach Unit Exit Survey – 1997	Time spent in Park (non-local visitors): ▪ 1 day or less – 48% ▪ 2 days – 27% ▪ 3 days – 14% ▪ 4 days or more - 11%	▪ No information	▪ No information
Cathedral Grove Exit Survey – 1996	Time spent in region (all visitors): ▪ Day trip – 12% ▪ 1 night – 18% ▪ 2 nights – 23% ▪ 3 nights – 20% ▪ 4 to 6 nights – 10% ▪ 1 week – 9% ▪ 2 weeks – 5% ▪ Over 2 weeks – 4%	Group size: ▪ 1 to 2 people – 75% ▪ 3 to 4 people – 17% ▪ 5 to 6 people – 8% Group Characteristics: ▪ Family – 45% ▪ Couple – 23% ▪ Friends – 15% ▪ Friends & family – 13% ▪ Alone – 2% ▪ Tour group – 2%	▪ Word of mouth – 45% ▪ Brochure – 30% ▪ Past experience – 28% ▪ Travel Information Centre/ Chamber of Comm. – 28% ▪ Magazine – 10% ▪ Travel agent – 10%
Clayoquot Sound Visitor Survey – 1997	Time spent in region (all visitors): ▪ 1 day – 3% ▪ 2 to 3 days – 35% ▪ 4 to 6 days – 36% ▪ Over 6 days – 25%	Group size: ▪ Alone – 10% ▪ 2 people – 40% ▪ 3 people – 13% ▪ 4 people – 16% ▪ 5 people – 5% ▪ 6 to 10 people – 12% ▪ More than 6 people – 5% Group characteristics: ▪ Family – 46%	▪ Friends/family – 50% ▪ Past experience – 42% ▪ Newspaper/magazine – 19% ▪ TV – 12% ▪ Travel agent – 4% ▪ Internet – 4% ▪ Travel Information Centre/ Chamber of Comm. – 2%

		• Friends – 39% • Alone – 12% • Tour group – 2%	
Activities in Pacific Rim Area			
Study	***Activities***		
Long Beach Unit Exit Survey – 1994	Information only on Park facilities/services used		
Long Beach Unit Exit Survey – 1997	Information only on Park facilities/services used		
Cathedral Grove Exit Survey – 1996	• Hiking – 53% • Meetings/conferences – 50% • Shopping – 49% • Nature/wildlife viewing – 43% • Aboriginal arts and/or crafts – 31% • Whale watching – 23% • Art galleries – 18% • Aboriginal cultural activities – 14%	• Museum – 11% • Sightseeing – 10% • Fishing – 8% • Other outdoor activities – 8% • Bicycling – 7% • Boating – 7% • Nature/wildlife viewing tours – 7% • Kayaking – 6%	
Activities in Pacific Rim Area			
Study	***Activities***		
Clayoquot Sound Visitor Survey – 1997	• Beach activity – 73% • Day hiking – 67% • Shopping – 52% • Other wildlife (watching) – 49% • Bird watching – 46% • Photography – 45% • Camping – 41% • Sea kayaking – 37% • Nature study – 32%	• Fishing – 26% • Visit hot springs – 25% • First Nations cultural activities – 18% • Surfing – 16% • Overnight hiking – 12% • Motor boating – 12% • Interpretation – 9% • Canoeing – 9% • Mountain biking – 9%	

Based on these studies, the following conclusions can be drawn regarding the market characteristics of visitors to the West Coast region:

- the origin of most visitors is BC residents, followed by Other Canada, the US and Europe;
- visitors are from all age groups, but the majority are 25 to 65 years;
- most visitors are well-educated;
- visitors' incomes are higher than average;

- the average travel party size is just over 2 persons, and travel parties are generally comprised of couples or families;
- visitors rely on word of mouth and their own past experience as sources of information; and
- visitors participate in a variety of recreation-, nature- and culture-related activities. Among the most popular outdoor activities are hiking and watching birds/wildlife. There is significant interest in Aboriginal arts and crafts as well as cultural activities.